



WP4 Case studies

D4.2 Evaluation report on each case study

Case Study: Government Program for the Elderly Social Activity based on the selected example.

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Executive Summary

This report presents the results of research about the Rządowy Program na rzecz Aktywności Społecznej Osób Starszych (Government Program for the Elderly Social Activity, ASOS) taken up by the University of Wrocław team as the example of the innovative social investment implemented in Poland at local level. This research was conducted in the framework of the InnoSI project no 649189. The aim of the research was to identify and evaluate social investment reform in the area of senioral policy in Poland.

This report investigates the implementation of the ASOS programme based on the selected “Aktywni bez względu na wiek” project (“Active regardless of the age” project). The analysed project “Aktywni bez względu na wiek” was implemented from 1 April 2015 to 31 December 2015 in Gdańsk by the non-governmental organisation Towarzystwo Edukacyjne Wiedza Powszechna (TEWP). The project focused on the activation of Gdansk seniors aged 60+, at risk of social exclusion, being in a difficult economic situation and with limited ability of using the educational offer of the University of the Third Age in Gdansk. The seniors collected new knowledge and learnt new skills that would enable them to more efficiently function in a changing world and maintain good physical, mental and intellectual condition.

The detailed research goals were following:

- Identification the legal framework of the senior policy and especially the ASOS Programme in Poland
- Identification the needs and expectations of elderly people in Poland as the target group of the ASOS Programme
- Explanation the existing theory of change (TOC) for the ASOS programme
- Examination if the intervention enables to reach the assumed outcomes and results and what kind of conditions determined the process of the project implementation
- Investigation the impact of the project on its main beneficiaries/seniors and all stakeholders who were affected by its

influence

- Verification of the economic effectiveness of this intervention.

This research process was based on analyses of the existing scientific literature, documents, quantitative and statistical data, previous evaluations and reports about senioral policy in Poland. The second, empirical part of the research which directly referred to “Aktywni bez względu na wiek” used qualitative data from project’s documentation like: evaluation report elaborated by the TEWP and final report from the project implementation. The valuable sources of qualitative data were interviews with different groups of project’s stakeholders like: semi-structured individual interviews with the seniors - 6 interviews, semi-structured individual interviews with service deliverers - 4 interviews, semi-structured individual interview with project coordinator- 1 interview, semi-structured individual interview with seniors families’ members- 2 interviews and focus interview (group) with seniors- 5 participants.

The first part of the report refers to the analysis of the senior policy in Poland, its genesis and current legal framework. This policy is one of the youngest public policies in Poland inspired by the demographic processes, especially ageing of society and the Polish accession to the European Union. The celebration of the 2012 as the European Year for Active Ageing and Solidarity between Generations was the main and direct reason of the institutional system of the senior policy in Poland creation. The ASOS Programme was established in order to the main senior policy objectives implementation. Most identified academic sources about the ASOS Programme are mainly descriptive with factual data but without deeper theoretical, analytical, scientific context. Especially there is a lack of evaluation of the effectiveness, efficiency and outcomes of this Programme, both at national and regional level and its influence on main stakeholders. The existing evaluations of the Programme mainly refer to the process of its implementation and the separate case study projects have been examined. Usually there is no information about the methodology of the design and implementation of the evaluation processes in the projects.

The next stage of the study is a needs assessment of elderly people in Poland. This needs assessment analysis asked the questions if and why the ASOS Programme and especially “Aktywni bez względu na wiek” project are the proper responses for social and individual needs and expectations of elderly people in Poland. The University of Wrocław research team investigated the main characteristics of seniors as the aged group in the Polish society. The analysis showed the elderly are very internally divided aged group with different needs and expectations and there is a high level of the feminisation of the ageing process in the Polish society. The existing needs assessment have mostly partial- local, regional and quantitative character and they are delivered by the institutions or organisations which are interested in senior policy programming and implementation. They give enough information about needs and expectations of senior citizens in Poland. They perform a picture of the oldest group of the Polish population and are the reliable source of data for public policy makers and public officers responsible for senior policy implementation. The recommendation of the UWr. research team is to conduct such kind of studies on a regular basis and updated empirical data in the field of recognition of the needs of elderly people. The extension of the research topics towards recognition of social needs of elderly people would be useful because a large part of the existing research is concentrated mostly on the health care and material needs.

The Theory of Change became the methodological background for the examination of the goals of the ASOS Programme within the implementation of “Aktywni bez względu na wiek” project have been achieved. Based on the ASOS Programme documentation and senioral policy evaluations the theory of change has been described as a path from the inputs and activities, by the outputs, to the results. The existing TOC for the ASOS programme was presented based on the existing documents analysis. It defines intended changes which should be produced as the result of the ASOS Programme impelentation: the improvement educational and social services for elderly people, social integration and social activation by voluntary activities of seniors in Poland. The existing

TOC for the ASOS programme does not explain the mechanisms and causes ('black box') which are needed for reaching the Programme outputs. This issue was the research subject in the next part of the report.

Through the process implementation evaluation, the existing theory of change for the ASOS Programme was verified. We examined plausible casual mechanisms that can explain why ASOS programme intervention (X) contributes to produce the defined outcomes in the "Aktywni bez względu na wiek" project (Y). This research process was implemented by the using process tracing method which is based on the hypotheses testing and verification. The results of the research show that although the ASOS Programme is the central government initiative, its implementation depends on local context, which is determined by the social, economic and cultural conditions. The main ones were: strong individual motivations of the beneficiaries participating in the projects, the correct identification the needs and expectations of the project beneficiaries and the preparation of educational services which were the proper responses for seniors' requirements, the cooperation between the social actor TEWP responsible for project implementation and services deliverers who represent private sector sensitive and flexible for seniors' needs which can be commercialised and met by market, using enhanced cooperation with public institutions and other social actors in order to acquire different types of resources, important for correct project implementation

The main aim of the impact evaluation of the "Aktywni bez względu na wiek" project was to identify if the intervention of the ASOS Programme made any changes in the personal and social situation of its stakeholders, especially elderly people, who were the beneficiaries of this intervention. As the result of conducted research, the main outcomes of the intervention were identified, which appeared as the result of the "Aktywni bez względu na wiek" project implementation. These analyses were made in order to examine if the "Aktywni bez względu na wiek" project achieved its stated objectives. It was a key query for the InnoSi project, which was positively verified. The impact evaluation showed not only the positive and intended changes in the beneficiaries' physical, mental and social

wellbeing and their social integration by activation in the local community but also several positive outcomes which were produced as unintended changes made by ASOS Programme, for example: new job opportunities for educational services deliverers or savings for national health care system.

The last part of the report presents the results of economic evaluation of the “Aktywni bez względu na wiek” project conducted with using the SROI method. It refers to the economic benefits, based on monetisation of the social outcomes of the considered project. The SROI gave insight into an economic effectiveness of the ASOS Programme and showed that throughout the “Aktywni bez względu na wiek” project it does not fulfil the economic criterion of social investment. However many arguments, especially based on impact evaluation results, support in fact such interventions in the frames of active ageing policy are indeed social investment.

The ASOS Programme is the first public intervention made by central government in Poland, in order to improve the seniors’ quality of life by their social activation and better integration with the society. It fulfils the criterion of social investment because it generates several direct advantages, not only for the elderly people as the target group of the Programme, but also for the local communities and local economy, where the intervention is implemented. The most important argument is that social activation of elderly people has changed their position and traditional role in the society. They are perceived as the active members of local community- volunteers who are able to support other social groups affected by social difficulties, like children from trouble families or older seniors who need health and care services. The results of the research show that better understanding the psychological and social needs of elderly people by families and local community have been observed. It supports the deeper integration of the seniors with the local community, which is especially important in the light of ageing Polish population processes. The ASOS Programme is also used to learn the elderly people new useful and practical skills (foreign languages, using computer and

internet), which make possible for them being more independent and self-reliant.

This social investment has also innovative character. Firstly, it is a supportive solution for development of the 'silver economy'. New educational and other social services, which are offered for seniors by the ASOS Programme, create new market of products and services, which is the response for elderly people needs and expectations. This process has changed the traditional understanding of population ageing as the social and economic problem towards the new interpretation of this phenomenon, as the opportunity for economic growth and new work places creation. Second, because the ASOS Programme is a driving force for taking up the intersectoral cooperation. The partnership between social, public and private sectors in delivering services is not new solution but in this context it is based on using the unique resources, which are delivered, by different type of actors. In this case, the added value of intervention is not only the phenomenon of the partnership, which traditionally is perceived as the part of democratic society, but the cooperation in order to rich the goal. This is a kind of economisation of the cooperation, where the partners are not equal and their significance is measured by the different types resources that they have.

Introduction

1.1 The Programme

Rządowy Program na rzecz Aktywności Społecznej Osób Starszych is one of the tools of the senior policy in Poland. The senior policy is one of the newest public policies implemented in Poland after 1989. It was established as a result of two processes. The first was the accession of Poland to the European Union (EU), where the support for the elderly people inclusion and activation is treated as a social investment. The

second one is strongly connected with the growing process of aging society in Poland.

The ASOS has been developed by the Ministerstwo Pracy i Polityki Społecznej (Ministry of Labour and Social Policy) as a response to the challenges, which have emerged as a result of demographic and social changes in Poland. According to the Główny Urząd Statystyczny (Central Statistical Office's) estimates, the number of people 65 + will be 8.3 million, which represents 23.2% of the population in Poland (GUS 2009: 311).

Polish accession to the European Union can be described as a milestone in the area of appearance of the senior policy, because of the fact that the European Social Fund (ESF) financed the first projects aimed at meeting the needs of the elderly people. They focused on the improvement the situation and position of the elderly in the labour market, including the activation of the unemployed aged 50 + (Tomczyk and Klimczuk, 2015: 69).

The first nationwide government Programme for seniors "Solidarity between generations. Measures to increase the activity of people aged 50+" was developed in 2008 and it referred, as well as initiatives funded by the ESF, to the issues related to the functioning of this age group in the labour market (Ministerstwo Pracy i Polityki Społecznej, 2008). Therefore, initiatives for seniors were implemented in Poland even before the establishment of the ASOS Programme, also at the local level (Tomczyk and Klimczuk 2015: 91-117).

The main impulse for the development of the ASOS Programme was establishment on the basis of a Decision No 940/2011/EU of the European Parliament and of the Council of 14 September 2011. The year 2012 became the European Year for Active Ageing and Solidarity between Generations (European Parliament and Council Decision, 2011).

In addition to the development of the Programme content, institutional and organizational basis have been created for the implementation of this policy in Poland. The active ageing policy especially after 2012 gained an interest and it could be said that it is conducted first

of all, at the national level. It started from the establishment of the Department of Senior Policy in the Ministerstwo Pracy i Polityki Społecznej (established in 2012). This was followed by implementing the ASOS Programme, developing the Long Term Senior Policy in Poland for years 2014-2020 and The Programme Solidarity between Generations. Also important were measures to increase the activity of people aged 50+ and the introduction of the Multiannual Programme "Senior-WIGOR" for the years 2015-2020 (Bardadyn, 2016: 1).

The Council of Senioral Policy (as a consultative-advisory body in the Ministerstwo Pracy i Polityki Społecznej) was established in February 2013. An amendment to the Local Government Law enacted on October 11, 2013 (as a result of which added to Article 5c of the Act regulating the appointment of municipal councils seniors and the adoption of a legal act defining the goals and tasks of the senior policy) and the Resolution No. 238 of the Council of Ministers from 24 December 2013 on the adoption of the document Assumptions Long-Term Policy, the senior in Poland for the years 2014-2020 (Szatur Jaworska, 2015: 54).

Senior policy in Poland is generally a package of actions implemented by public administration at several different levels. The main objective of the senior policy in Poland is to support and provide opportunities for active ageing in health and for continued self-reliant, independent and fulfilling life, even with some functional limitations (*Long-term Senior Policy...*, 2013:9).

The ASOS 2014-2020 was established with the goal of promoting well-being and extending the working life of older adults through engagement in social activities such as volunteering and learning opportunities.

The ASOS Programme has had two editions: 2012-2013 and 2014-2020. The main objective of the Programme under both editions is to improve the quality and standard of living of the elderly, dignified aging through social activity. In these two editions of the Programme the same four specific objectives were defined and they have been assigned specific performance indicators and sources of verification.

Table 1.1. Objectives of the program ASOS 2012-2013 and 2014-2020 and their verification

ASOS 2014-2020 Programme objectives	Indicator measurement	Source of verification
<p>Main objective Improvement of the quality and level of life of older people for the dignified aging through social activity</p>	<ul style="list-style-type: none"> - Respondents working in civil society organizations at the age of 60 - Voluntary work in organizations and outside the organisations at the age of 60 	<ul style="list-style-type: none"> -CBOS -GUS
<p>Specific objective no. 1 Increasing diversity and improving the quality of learning opportunities for older people.</p>	<ul style="list-style-type: none"> -Number of new participants -Number of newly created activities -Average monthly number of hours of newly created classes for elderly people -Number of volunteers participating in projects 	<ul style="list-style-type: none"> - Reports on the Programme implementation
<p>Specific objective no. 2 Creating the conditions for integration between and within the elderly using the existing social infrastructure</p>	<ul style="list-style-type: none"> - The percentage of people 60 + who regularly use a computer -Number of beneficiaries participating in the newly created project - Number of volunteers 	<ul style="list-style-type: none"> - <i>The information society in Poland. The results of statistical survey</i> - Reports on the Programme implementation

	participating in projects	
<p>Specific objective no. 3 Development of various forms of social activities, including the promotion of voluntary work, participation in decision-making processes, including the elderly involvement in shaping public policy.</p>	<ul style="list-style-type: none"> - -The number of projects submitted in the area of public life participation of elderly people -Number of newly created network/care centres of assistance and information -Number of beneficiaries participating in the newly created project -Number of volunteers participating in projects 	<ul style="list-style-type: none"> - Reports on the Programme implementation
<p>Specific objective no. 4 Increasing the availability, improving the quality of social services and support activities for self-help and self-organization.</p>	<ul style="list-style-type: none"> - The number of beneficiaries of the new social services -Number of beneficiaries of new forms of self-help -Number of volunteers participating in projects 	<ul style="list-style-type: none"> - Reports on the Programme implementation - Reports on the Programme implementation - - Reports on the Programme implementation

Source: Own elaboration based on Ministerstwo Pracy i Polityki Społecznej 2012: 19-20 and Ministerstwo Pracy i Polityki Społecznej 2014: 10-11.

Enumerated in Table 1 indicators of the ASOS Programme partially overlapped in both editions, some of them have been slightly changed. In the second edition the greater emphasis has been set on the development

of volunteering, which reflected the newly introduced indicators. Regardless the edition in which the ASOS Programme was or is implemented, the evaluation is based on quantitative indicators, which can be verified by surveys and reports on the implementation of the Programme.

The objectives of the ASOS Programme are based on four priorities: education of older adults; intergenerational social activities such as recreation activities for grandparents and grandchildren, participation of older adults in social activities such as gardening, interaction through learning, physical exercises with a group; and recruiting older adults as volunteers to do for example grocery shopping or cooking. With a total budget of 280 million PLN (\$84 million), non-governmental organizations, sports clubs and associations of local governments are encouraged to keep older adults active and healthy.

Since the beginning of the program, the Ministerstwo Pracy i Polityki Społecznej has published two evaluation reports on ASOS Programme implementation in 2013 and 2014 (Ministerstwo Pracy i Polityki Społecznej 2014a, 2015). The reports include figures on organized competitions in the division on the number of bids in relation to co-financed projects in various regions, types of organizations applying for funds, the number of applications within the individual priorities of the program, partner deals and financial allocation. The report for 2013 contains additional survey of the beneficiaries of the second edition of the competition in which they responded to opinions how to implement the competition, the benefits of participation in the ASOS and possible areas for further development (Ministerstwo Pracy i Polityki Społecznej 2014a: 20). There is lack of information relating to the achievement of the goals of the Programme. It is hoped that the Ministerstwo Pracy i Polityki Społecznej put the evaluation of the effectiveness of program evaluation in the near future carried out, and the results made public.

Leaving aside the question of conducting a systematic quantitative evaluation of the ASOS Programme, worth noting are its limited capabilities, which prevent the extension of measuring Programme impact

not only directly on the ultimate beneficiaries, but also indirectly on the broad social environment. There is no data on the impact of the program even if, for example, to: increase the experience, competence and quality of the organization implementing projects for the elderly, the development of inter-sectoral cooperation of public, social and private resources for older people in Poland and the strengthening of the silver economy as a result of the program ASOS. These issues require in-depth research, which is the application of qualitative analysis.

The criteria adopted in quantitative evaluation do not allow us to determine the factors that have a positive impact on the achievement of the objectives of the Programme. Qualitative research is therefore necessary to define the context, conditions, and mechanisms that influence the success of the Programme or pose a threat to the achievement of its objectives. Quantitative research fulfil the explaining function and even allow for the evaluation of effects that occurred in a manner not specified in the Programme, but as a result of its implementation.

Accurate, reliable and in-depth evaluations based on the results of research should constitute the core of the implementation of evidence-based policy. To conduct qualitative research for the Programme of this scale is a methodological, financial and organizational challenge. The scale of the ASOS Programme is visible in the number of financed projects. For example 490 projects subsidy received the financed with the global value around 38 million PLN in 2014 (Ministerstwo Pracy i Polityki Społecznej 2015: 4).

1.2 Regional/local context

1.2.1 Territorial characteristic of the Pomorskie region

The “Aktywni bez względu na wiek” project is located in the capital city of the Pomorskie (Pomerania) region. This region has administrative (voivodeship), functional and economic character. Pomorskie is one of 16 voivodeships in Poland and 3 voivodeships on the Baltic Sea. It neighbours the Scandinavian countries across the sea-border in the north, and the

Kaliningrad Circuit of the Russian Federation in the east. The region occupies 18 300 km² accounts for 5.9% of the country area. It is inhabited by 2.21 million people, i.e. 5.8% of the Polish population. The average settlement density for whole region is 121 people per 1 km². In the country-wide perspective, it ranks among medium size regions in terms of both the area, and the population (Polska Agencja Informacji i Inwestycji S.A.).

Nearly 67% of Pomerania's population lives in its 42 cities and towns. The Tricity agglomeration comprising Gdańsk, Sopot, and Gdynia has the status of the heart of the region and generally northern Poland. Due to the attributes of its natural environment the voivodeship is perceived as one of the most attractive Polish regions to settle down. Gdańsk is the capital of the region and its largest city with 455 thousand inhabitants.

The Polish administrative system is built on three levels of self-government: the gmina (commune), powiat (county), and voivodeship (region). Gdańsk is the urban commune; the authority contains rada miasta (a city council), which is the legislative body and executive-prezydent (a president). The regional government in Pomorskie region is represented by the Marszałek Województwa (Voivodeship Marshal) and Urząd Marszałkowski (the Marshal Office) Marszałek heads. The Sejmik Wojewódzki (Regional Parliament) is the legislative body at the regional level of governance. All region inhabitants in the general, democratic elections elect it. The executive powers are vested in a five-member Zarząd Województwa (Regional Board) chaired by the Marshal. Wojewoda (a Voivod) represents central administration in the region. The Wojewoda, in its capacity of the regional representative of the central government, sees to safeguarding the state's rights and interests in the region. This institution is also in charge of: public safety, selected civic affairs, and representation of the central government (Borodo, 2012).

1.2.2 Economic profile of the Pomorskie region

The gross domestic product (GDP) generated by the Pomorskie Voivodeship in 2006 amounted to PLN 60.250 billion. Over 50% of the

voivodeship's GDP is generated by the Tricity (Gdańsk—Gdynia—Sopot). The economic potential of the region is founded on both traditional industries like: shipbuilding, oil refining, food products, machines, furniture, and tourism and the developing trades like information and communication technologies, electronics and biotechnology. Shipbuilding is Pomorskie's leading industry and largest employer. This trade is represented by building yards, repair yards, and the cooperating companies whose offers go beyond the industry to include services available to other trades (Pomorskie Office in China). ICT is one of the fastest growing sectors in Pomorskie region. In 2013, the sector generated a record revenue representing 1/6 of the entire region, and it is still growing. Region's ICT sector hosts 5648 active companies. For comparison, in 2009 there were 3445 companies operating in Pomorze (Polska Agencja Informacji i Inwestycji Zagranicznych S.A).

Table 1.2. Gross Domestic Product in 2014 in Pomorskie region in comparison with Poland

GDP 2014	In PLN (milion)	In %	Per capita
Poland	1 719 097	100	44670
Pomorskie	97883	5,7	42580

Source: GUS, 2015

Regional Pomorskie Labour Market in 2016

Table 1.3. Economic activity of the population aged 15 and more

Unit	Economically active persons (in thous.)	Activity rate (%)	Registered unemployment rate (%)
Poland	17 215	56,1	7,0
Pomorsk ie	1 045	57,8	6,4

Source: GUS, 2016b

In accordance to the changes of age structure of the Pomorskie region it is expected the growth of demand for health and care services. Taking into consideration the high level of tourist attractiveness and very well developed tourist infrastructure, the 'silver economy' (services for

elderly people) and recreational services will play a more important role in the structure of economic activity of the Pomorskie region.

1.2.3 Demographic profile of the Pomorskie region

In comparison to the rest of the Polish regions, the Pomorskie region stands out from them because of the positive birth rate and the positive migration balance (third position in the country scale). It results in the highest real rapid increase in population among Polish regions. The region's inhabitants are younger than the average for Poland which is important for the regional labour market functioning. The number of children and youth of pre-working age (0-17 years) accounted for 19.4% of the population of the region (a decrease of 0.1 percentage point compared to 2014), which ranked Pomorskie in the first position in Poland (GUS, 2016: 34-36). Despite these demographic trends, the process of population ageing has already started in the Pomorskie region. The systematic increase in the number of population at age over 65 is observed (from the level 12,2% in 2010 to the level 17,3% in 2020). The decrease in the number of the population in the age under of 24 has been observed and group is project to reduce to about 8,5%. The ageing process in Pomorskie region will be less pronounced than in the rest of Polish regions. As the result the Pomorskie region will be the demographically youngest voivodeship in Poland with positive birth rate and one among four regions which will note the increase the number of population. The share of the region in the total number of Polish population in 2020 will be 6%. The number of regional inhabitants will increase by 50 thousand in comparison with 2010, wherase in the perspective of the whole country the total number of population will be decrease (Sejmik Województwa Pomorskiego, 2012: 10).

1.3 Selection of the project

The analysed "Aktywni bez względu na wiek" project was implemented in Gdańsk in two editions, from 1 March 2014 to 31 December 2014 and from 1 April 2015 to 31 December 2015 by the non-governmental organisation Towarzystwo Edukacyjne Wiedza Powszechna.

In each edition of the project 60 people aged over 60 attended (Towarzystwo Edukacyjne Wiedza Powszechna 2015: 1-2)

The choice of the project, implemented under the ASOS Programme, which was evaluated, was not accidental. At the stage of choosing a case study to be analysed, the following selection criteria were used:

1. the stage of implementation the selected project – the project has to be finished
2. the project has to achieve its objectives
3. the project was to be directed to beneficiaries aged 60+ excluded or threatened with exclusion, characterized by a low level of activity,
4. the subject of the analysis was to be a project implemented by organisation which guarantees free and unlimited access to all project documentation and the ability to conduct individual interviews and group interviews (focus) of the project beneficiaries and their families, a person representing the entity implementing the project and the service deliverers in the project.

The "Aktywni bez względu na wiek" project met all of the established selection criteria, and the subject of the evaluation was carried out in the second edition took place in 2015. Another reason which determined the selection of the project to research was its location. Gdańsk, the city where the project was implemented conducts active senior policy and implement not only the central government initiatives but also locally-led projects initiated by local self- government, e.g.: Gdański Senior programme and The model of seniors voluntary activities in Gdańsk.

This project was implemented under the first priority of the ASOS Programme 2014-2020 and assumed the growth the activity of elderly people by giving them the access to the knowledge, skills and social competences that are crucial for better functioning in the dynamic global environment. The participation in the project should help them to maintain good physical, psychological and mental condition. Sixty elderly people at the age 60+ were involved in the project. They participated in different types of lectures, classes and workshops devoted to inter alia healthy style of living or learning new language and also received varied types of

consultations and advisory services in order to improve their mental and physical wellbeing and the quality of life.

This choice of the second edition of the project was made because of the easy access to both beneficiaries and staff implementing the intervention. The project stakeholders were the most important sources of information on which the evaluations were based.

Both the evaluation of the project carried out by the TEWP responsible for its implementation, final report from the implementation of the project submitted and approved by the Ministry of Family, Labour and Social Policy (Ministerstwo Rodziny, Pracy i Polityki Społecznej)¹, as well as the interviews with the beneficiaries of the project indicated that the main aims of the project were achieved (Towarzystwo Edukacyjne Wiedza Powszechna 2016: 3-4; 2015: 4). In practice, this means that the implementation of the ASOS Programme has contributed to increase the social activation of elderly people in Gdańsk and the acquisition of new skills with computers and knowledge of English.

1.4 Report structure

The report consists of seven parts strictly following the path of in-depth policy analyses. The literature review covers key policy and scientific literature description relating to the senior and active ageing issues in Poland, especially the ASOS Programme. The next chapter refers to existing and new needs assessment in the area of the social, economic and cultural characteristics of Polish seniors. The theory of change chapter contains the description of the existing theory of change in the frames of the ASOS Programme. It presents the assumed changes and outcomes, which should be produced as the result of the ASOS Programme intervention. The main part of the report presents the results of the process implementation evaluation. The analysis was elaborated for the "Aktywni bez względu na wiek" project, as the example of case study how the ASOS program is implemented on the local level. In this part of the report the causal mechanisms, which have significant impact on the

¹ From 16 November 2015 the name of "Ministry of Labour and Social Policy" has been changed to the name "Ministry of Family, Labour and Social Policy. "

“Aktywni bez względu na wiek” project implementation, were examined and described. The impact and the economic evaluations of the “Aktywni bez względu na wiek” project were put at the two last parts of the report. They refer to the outcomes, which were actually produced in the project and the attempt to elaborate their monetarisation. The final chapter contains the list of references which were used by the University of Wrocław research team during the research process.

2.Literature review

2.1 Policy analysis

2.1.1 Development of the policy

Demographic change in Poland was related to political, social and economic transformation of the country in 1989 from the communist to a democratic regime and from planned economy towards a more market-oriented economy. During this period, an increase in the number of elderly people was noted in Poland (Tomczyk and Klimczuk, 2014). The senior policy in Poland is the area of activity of public administration and other organizations and institutions at all levels (from national to local) which undertake tasks and initiatives creating conditions for a dignified and healthy aging (Ministerstwo Pracy i Polityki Społecznej, 2013).

Aging of the population was slowly highlighted in Poland by projects supported by the European Social Fund during: the EQUAL Community Initiative Programme 2000–2006, the Human Capital Operational Programme 2007–2013, and is continued in the Knowledge – Education – Development Operational Programme 2014–2020 co-financed by the European Social Fund. Projects included in those programs have been implemented by different entities on national, regional and local levels. They are mostly aimed at increasing older workers (50+) employability, intermentoring (mentoring of older workers for young employees), and promoting age management in organizations.

Announced in September 2012 by the European Parliament and the European Union, the European Year for Active Ageing and Solidarity between Generations activated the Polish government to promotional activities in the policy of active aging population. The celebration of The

European Year for Active Ageing and Solidarity between Generations in Poland was to "draw public attention to how valuable contribution make the seniors into the society" and also "crack down the stereotype of the passive seniority" (Wójcik, 2012: 27).

In January of 2012 the National Action Plan for the European Year for Active Ageing and Solidarity between Generations (Ministerstwo Pracy i Polityki Społecznej, 2013a) was published and has set out the main objectives and planned activities to celebrate the European Year 2012 in Poland. The National Action Plan which motto was: "It is worth be an active ... regardless the age," was implemented on national and regional level by state administration and third sector organizations (Ibidem: 9-31). It sets out three areas of action: the labour market and maintain the resources of older workers (by adapting to the needs and requirements of senior citizens), activity in the public sphere and social (family, the local community) and to maintain the independence of the elderly as long as possible (despite the perceived discomfort and disability) (Ministerstwo Pracy i Polityki Społecznej, 2012).

In parallel, the Human Rights Defender published a monograph: "Strategies of action in an ageing society. Theses and Recommendations" (Rzecznik Praw Obywatelskich, 2012). The report has presented the primary measures to improve the situation of seniors in Poland and indicated significant directions in which senior policy should be conducted in the senior Poland.

On 19-20 March 2012 in Warsaw the Congress of Universities of the Third Age was held as part of the celebrations of the Year Universities of the Third Age, announced by the Senate of Poland. "The Pact for Seniors" was a final declaration of members of Universities of the Third Age (UTW) conference.

The year 2012 was full of important events related to the European Year for Active Ageing and Solidarity between Generations and the Year of Universities of the Third Age. While summarizing the European Year of Active Ageing and Solidarity between Generations, it turned out that Poland was among the three countries (along with Ireland and Austria)

that have made major changes in the senior policy and have accomplished the best implementation of ideas behind the European Year for Active Ageing and Solidarity between Generations (*ABC polskiej polityki senioralnej*, 2016).

In February 2013 the Council for Senior Policy began works on developing a long-term policy objectives of seniors called “Assumptions of the Long Term Senior Policy in Poland” (Ministerstwo Pracy i Polityki Społecznej, 2013). The document contains diagnosed challenges in many areas: health and independence of elderly people, the development of social services and care, safety, space and place of residence, professional activity of 50+, educational activity, social and cultural, silver economy and intergenerational relations.

The year 2013 also saw changes in local government. Since December, local councils can appoint Senior Citizens Councils, which play consultative, advisory and enterprising role in the implementation senior policy at local level (*Ustawa...*, art. 5, 2013). The rationale for such a change is the increasing number of elderly people and the desire for growth of their activity in various fields as the solution for their quality of life improvement. Establishment of municipal councils for seniors is to allow them represent more effectively the expectations and needs of this group to the local authorities and community.

The package of documents that presents the assumptions of the government senior policy in Poland also consists “Solidarity between generations – Measures to increase labour force participation of people aged 50+ for the period 2014–2020”. The document was designed to cover a wide spectrum of initiatives. The aim of the Programme is to utilize the human resources of people aged 50+ more efficiently. One of the most prominent priorities of the document is the maximum use of the potential of people aged 50+ on the labour market. One of the lowest employment rates of people aged 55–64 in the whole of the European Union has been observed in Poland.

2.1.2 Legislative framework

The ASOS 2012-2013 Programme was a response to the challenges of demographic and social processes in Poland (Ministerstwo Pracy i Polityki Społecznej, 2016). Its main objective was to create conditions for the development of the social activity of seniors, who, owing to the population boom of the 50s, are, or soon will be, entering the 60+ age group. These people may be ending their professional activity, but they remain in good psycho-physical condition, have a potential, qualifications, life experience and free time that can and needs to be utilized with an appropriate social activities offer. Activity is one of the indispensable elements of healthy ageing. A pivotal role in this process is also played by cooperation and integration, in as well as between generations.

The Programme assumes simultaneous actions in four areas of senior social activity. It is based on the following priorities: **priority I:** education of seniors – this includes actions for the development of educational offers aimed at seniors, the use of the potential of mutual learning, the development of innovative forms of education, informal and non-formal, promoting the so-called competence volunteering; **priority II:** social activity promoting integration in and between generations – this assumes the development of different forms of senior activity, with the use of the existing social infrastructure (e.g. public libraries, cultural centres), and includes the younger generation to create a mutual understanding and development of social skills; **priority III:** social participation of seniors – measures for a greater involvement of seniors in public, social, economic, cultural and political life, which will contribute to the growth of civil society. A particularly important role in this field is played by organisations that represent the interests and needs of the elderly, and that encourage their commitment in the life of local communities, e.g. senior boards attached to local governments; **priority IV:** social services for seniors – actions for the development of different forms of support through an increase in availability and quality of social services for seniors (Ministerstwo Pracy i Polityki Społecznej, 2013b).

The programme included the contest and system components. The contest component assumed financial support to projects implemented by organizations working in the field of public benefit in four priority areas for the elderly. The implementation of allocated funds amounted to 20 million zlotys in 2012 and 40 million zlotys in 2013. The first edition of the open offer contest was resolved in October 2012.

The experiences from the implementation of the ASOS 2012-2013 Programme were the foundation for the design of the next edition of the Programme for the period 2014-2020. It was created as a result of cooperation with organisations that implemented projects within the contest component of the Programme and a close dialogue with representatives of the non-government sector, scientific and expert communities, self-governments, central administration, trade unions and employers associations, held, among others, within the activities of the Board for Senior Policy.

The Programme is designed as a complex endeavour that addresses areas and directions of support that enable the achievement of the main objective, i.e. the improvement of the quality and level of senior life for decent ageing through social activity. It assumes practical integration of the non-government sector to the actions for senior engagement. The Programme budget for 2014-2020 will amount to 280 million PLN. As the ASOS Programme for 2012-2013, it lays the strategic foundations for the implementation of the social policy for the elderly has profound significance for its future. The rational concept of the long-term policy in this scope can be formulated in the near future only in a participation formula, with the involvement of all stakeholders. The Programme is also envisaged for seven consecutive years, as only comprehensive and accurately long-term actions have a chance of providing a permanent effect for the social situation of seniors, realised against the demographic challenges of Poland.

2.1.3 Academic analysis

The main objective of academic literature review was, to identify if and how the ASOS Programme has been described in the existing scientific literature. This programme has been a significant part of active aging and senior policies in Poland since 2012. It has defined the main goals of public intervention for elderly people' support and has had a separate budget dedicated to the projects and actions for social activation of elderly.

Methodology of the academic analysis review

The adopted methodology of in the process of scientific literature review made possible to identify of what kind of information, ideas and analyses of the Programme has been published by academics and researchers. Print and electronic materials such as: academic papers from scientific journals, scientific monographs, chapters from academic volumes, empirical research, conference papers and scientific reports, both theoretical and empirical were used. Searches of electronic databases were supplemented by hand searching and bibliographic searching. The electronic sources were searched by using scientific databases like: Cambridge Humanities & Social Sciences Journals, EBSCO, Google Scholar, JSTOR, SCOPUS, Science Direct, Wiley Online Library.

The following selection criteria of sources were established:

- language: Polish and English,
- time frame: from 2012 to 2016,
- phrases used in searching the publications: Rządowy Program na rzecz Aktywności Społecznej Osób Starszych, ASOS, Government Program for the Elderly Social Activity, Government Programme for Senior Citizens Social Activity, Government Program Stimulating Social Activity of Seniors, Government Programme for the Social Participation of Senior Citizens. All English titles refer to the same Programme and the differences are the result of different translation of the Polish title of the Programme into the English.

Results o the academic literature review

There is a significant number of scientific literature papers which are concentrated on the senior policy, active aging and social activation of senior citizens in Poland. The growth in the research and number of scientific publications devoted to this issue is a result of the several factors: demographic challenges and ageing of Polish society, implementation the European approach to ageing issue and the development of the national senior policy and its new instruments.

Some papers identified concentrate on analyses of the potential long-term consequences of the demographic crisis and the planning the scenarios for the future (Kowaleski and Majdzińska, 2012; Okólski 2004). The scientific publications contain other related topics like: instruments of seniors' social activation development (Czapulis- Rutkowska, 2013), elderly care and other social services for old people (Stypuła et al., 2011; Kotowska and Wóycicka, 2008) or pension system in Poland (Sęk and Cieślak, 2005). We can also find scientific reports which evaluate the social, economic, professional, family situation of the elderly people, their needs and activity in the public sphere (Czapiński and Błędowski, 2014; Błędowski, et al., 2012). Although this topic is very well developed by social scientists, the ASOS Programme is not a part of the research mainstream.

Most academic analyses describe the Programme as a part of the senior policy in Poland, which has been established by the Ministerstwo Pracy i Polityki Społecznej. The authors define the main objective of the Programme which "has to a contribute to a fuller use of the socio-professional potential of older people so that they can perform different social roles in public life" (Tomczyk and Klimczuk, 2015: 35). In some papers the ASOS Programme is described as the innovative instrument, which creates the new quality of senior policy in Poland (Błędowski et al., 2012).

In some academic sources the justification for the establishment of the Programme is explained. The Programme is considered as an answer to the challenges posed by the social and demographic processes in Poland. One of the most important and challenging processes considered from the

social and economic point of view is ageing the population in Poland (Adamczyk, 2015). In 2025 the number of people in productive age will be reduced by about 4 million and the significant increase in the number of citizens aged over 65 is expected (Samoliński et al., 2015).

The authors claim that Polish accession to the European Union forced the creation and implementation the active ageing policy in Poland and the European Year for Active Ageing and Solidarity between Generations announced in 2012 in Europe was the inspiration for ASOS Programme establishment (Chabior and Krawczyk-Blicharska, 2014; Raław and Rosochacka-Gmitrzak, 2013; Styczyńska, 2014).

According to Michał Kubiak the ASOS Programme was created in order to support non-governmental organisations and institutions active in the area of senior issues (Kubiak, 2015). The second aim of this Programme, which is reflected in the systemic pillar of its implementation, is to establish the background and rules for long-term senior policy in Poland (Kubiak, 2016; Urbaniak, 2013).

The academic analyses enumerate the institutions and public bodies responsible for coordination and implementation of the Programme. The first is the Department of Senior Citizens Policy of the Ministry of Labour and Social Policy established on August 16, 2012. The next is Senior Policy Council established in February 2013 as a part of ASOS framework. It plays advisory role towards the Minister of Labour and Social Policy. Its members are the representatives of other ministries, self-governmental administration, non-governmental organizations operating in the field of active and healthy ageing and experts (Adamczyk, 2015; Samoliński et al., 2015; Kubiak, 2014). Barbara Szatur-Jaworska notes that it is difficult to evaluate the effects of activity the Senior Policy Council because there is a lack of the data about its influence on the content of the ASOS Programme (Szatur-Jaworska, 2015).

The list of potential bodies who can benefit from this Programme is presented. Non-governmental organisations, social cooperatives, sports clubs and associations of local governments are enumerated by the researchers (Kubiak, 2015; Kubiak, 2016; Tomczak and Klimczuk, 2015).

The authors explain that the Programme is based on cross- sectoral cooperation at the local level. This rule is considered as a factor which can significantly increase the effectiveness of actions taken towards of the social activation of elderly.

There are detailed descriptions of the four priorities of the Programme: I. Education of the elderly II. Social activity promoting the intra- and intergenerational integration III. Social participation of older people IV. Social services for elderly, including the directions of activities (Adamczyk, 2015; Kołodziejczyk- Olczak, 2014; Kubiak, 2015; Styczyńska, 2014; Tomczak and Klimczuk, 2015). Some authors enumerate detailed measurements, which will show if the goals of the Programme are achieved (Kubiak, 2015).

Researchers in scientific resources present the descriptions of projects as the case studies of the ASOS Program. They show how the particular projects fulfil the general aims of the Programme and the results, which have been achieved in accordance to the personal development and social integration, and activity of elderly people. Michał Kubiak defines one of the ASOS project “Aktywni bez względu na wiek” (Kubiak, 2015).

The other ASOS project described in the scientific literature, implemented in the small town Wadowice was analysed by Małgorzata Malec and Tomasz Siemieź. The first part of this paper concentrates on the theoretical dimension of the project with considerations about potential of the elderly people in the context of the lifelong learning processes and the second one refers to the small community of Wadowice town taking up activities in the area of elderly support. The project is presented as an example of good practice, which can be replicated in different initiatives oriented on seniors’ activation development. It contained various initiatives and actions which were designed by primary school and local seniors, including: lectures about health style of living, workshops for seniors, physical education, integration events and trips, intergenerational cooperation, permanent voluntary services of senior citizens for the local primary school. For this reason the project “Sparks 2” was estimated as an

innovative solution in the framework of the senior policy (Malec and Siemież, 2012).

Janusz Czapiński and Piotr Błędowski note that the ASOS Programme supports the development of intergenerational integration (Szarota, 2015) and new types of social ties connecting all generations, which is named as linking social capital. According to the authors the linking social capital will be important because of the negative demographic trends and negative changes in the families' structure (Czapiński and Błędowski, 2014). Linking social capital created by the intervention of the ASOS Programme allow limitation of this negative trends.

General conclusion from the academic sources review is that the considered Programme is not the main field of interest of the scientists. It is described as the one of many possible elements of senior policy, which is important, but without deeper scientific analyses of its significance and empirically verified results. Most identified academic sources about the Programme are mainly descriptive with factual data but without deeper theoretical, analytical, scientific context. Especially there is a lack of evaluation of the effectiveness, efficiency and outputs of this Programme, both at national and regional level and its influence on the creators, contributors and beneficiaries. There is also no research about managerial aspects of the Programme implementation, for example, the quality of cross- sectoral cooperation or the significance of social and private partners in implementing separate actions and projects. Although senior policy and active aging issue in Poland are the objects of the scientific research and considerations, the ASOS Programme as the instrument of this policy is not the object of the analyses. There is also the limited number of the scientific sources in English which are devoted to the ASOS Programme.

2.2 Previous evaluations

2.2.1 Search strategy

The strategy used to identify previous evaluation:

Types of sources

The strategy used to identify previous evaluation of the *case study* was based on print and electronic sources for the case study literature review. University of Wroclaw focused on primary academic sources such as: academic journal articles, empirical research, scientific monographs, and chapters from academic volumes, scientific reports and conference papers.

All sources were chosen with the respect of the search terms used in English and Polish. Due to this, academic papers were selected that were published in the peer-reviewed journals from the base Journal Citation Reports (in English) and the list of Polish Ministry of Science and Higher Education (in Polish).

The secondary analysed sources were following: national and regional planning documents, governmental analyses and evaluations, documents generated by the Ministerstwo Rodziny Pracy i Polityki Społecznej (previous name Ministerstwo Pracy i Polityki Społecznej till 2015)

Time frame

The subjects of analyses were sources published from 2012 to March 2016. In 2012 the first edition of the ASOS Programme was established and implemented. We also took into account the ex-ante evaluations of the Programme.

Electronic databases searched:

Databases, websites and electronic journals were used for the scientific literature review: Cambridge Humanities & Social Sciences Journals, EBSCO, SCOPUS, Wiley online Library, JSTOR, Google Scholar.

Search terms used:

Electronic database and printed materials were searched using a combination of the following phrases and key words search: Rządowy Program na rzecz Aktywności Społecznej Osób Starszych, ASOS, Government Program for the Elderly Social Activity, Government Programme for Senior Citizens Social Activity, Government Program

Stimulating Social Activity of Seniors, Government Programme for the Social Participation of Senior Citizens, ewaluacja, evaluation, ocena, assessment, raport, report.

Journals hand searched:

Systematic search of the following Polish scientific journals which are devoted to the aging, elderly people and senior policy issues in the different context and published between 2012 and 2016:

Edukacja Dorosłych

Exlibris Biblioteka Gerontologii Społecznej

Polityka Społeczna

Problemy Polityki Społecznej. Studia i dyskusje

Rocznik Andragogiczny

Studia Demograficzne

Websites searched:

<https://www.mpips.gov.pl/seniorzyaktywne-starzenie/rzadowy-program-asos/>

http://senior.gov.pl/program_asos/pokaz/8

<http://www.rynekseniora.pl>

<http://www.ngo.pl>

<http://biznesspoleczny.pl>

www.wrzos.org.pl

Experts contacted:

Dr Michał Kubiak (University of Gdansk),

Mgr Filip Pazderski (Institute of Public Affairs)

The methodological foundations of the case study analysis have been discussed with above-mentioned experts. They delivered some useful information and sources about the ASOS Programme and the experts were consulted on the research and evaluation processes in the framework of the case study.

2.2.2 What do previous evaluations tell us?

The existing evaluations of the ASOS Programme are limited to the experts' opinions and most of them are based on the experiences from the first edition of the Programme 2012-2013. The Programme attracted strong interest of the potential beneficiaries, reflected in a huge number of applications although some experts claim that Programme should be more focused on local level. The implementation of the first edition of the Programme 2012-2013 made possible the execution over 400 projects (Styczyńska, 2014).

If we assume that consulting the public about the project of the ASOS Programme 2014-2020 is a type of ex-ante evaluation, it was made in 2013 before the establishment of the second edition of the Programme. Nine institutional stakeholders (regional authorities, non-governmental organisation representatives, regional centre of social policy, trade unions, Council of Public Benefit Activity, university of third age) and one individual expressed their opinions in the procedure of consultation of the Programme's project. This evaluation has to be assumed as a non-representative but some of the opinions expressed by the stakeholders were taken into account and included in the final version of the ASOS Programme preparation. Some of them concerned to the aims of the Programme, potential beneficiaries, system of management, budget and financial aspects of the Programme and needs of the future evaluations of actions (Ministerstwo Pracy i Polityki Społecznej, 2013c). The project of the ASOS Programme was evaluated critically. The All-Poland Alliance of Trade Unions expressed opinion that the Programme was naive and the aims defined as the improvement of the standard of living and the quality of life of the senior citizens could be achieved by instruments of active labour market and social security, not by social activity of the elderly people. In turn, the "Solidarność" trade union put its attention, among other things, on the lack of territorial dimension of the Programme. The "Solidarność" claimed that the significant developmental disparities among urban and rural areas existed in Poland which was reflected in the different level of education, different access to the health services and even in the people'

mentality. The Programme had to consider regional differences in order to combat social exclusion. The Marshal Office of the West Pomerania Region noted that the project of Programme had to focus on the utilisation of the potential of elderly people and limited the financial support for the projects oriented for passive activity of senior citizens (Ibidem).

The Department of Senior Policy Polish Ministry of Labour and Social Policy has presented systematic evaluation reports of the ASOS Programme since 2013. Three reports have been published up till now (2013, 2014, 2015). The reports present:

- statistics about applications
- budget
- the number and types of projects which were supported by the ASOS Programme
- types of beneficiaries who received financial support for projects implementation
- regions with the greatest number of applications
- regions with the greatest number of the implemented projects

The evaluations made in 2013 and 2014 were also based on the beneficiaries' opinions collected in the two editions of survey. They indicated positive and negative aspects of the competition in the framework of the Programme, advantages from the Programme and fields, which should be improved. These evaluations were made in order to identify opinions of the organisations which participated in the ASOS Programme and adjust it to their needs and expectations (Ministerstwo Pracy i Polityki Społecznej, 2013d; Ministerstwo Pracy i Polityki Społecznej, 2014). The survey showed that owing to the Programme the beneficiaries have many advantages, especially:

- they have offered better services for senior citizens
- they have developed the own human resources and organisational potential
- they have gained the experiences in the cooperation with public administration
- they have gained the experiences in the cooperation with other

organisation(s)

- they have improved won material resources (equipment)

First edition of the Programme contained two rounds. The total number of applications was 1391 and finally 426 projects were supported. The financial contribution of the Programme was 36 milion PLN (Ministerstwo Pracy i Polityki Społecznej, 2013d).

In the second edition of the Programme 1769 applications were submitted and 300 projects received financial support. The financial contribution of the Programme was 21 milion PLN (Ministerstwo Pracy i Polityki Społecznej, 2014).

In the third edition of the Programme, 2434 applications were submitted and 490 projects received financial support. The financial contribution of the Programme was 38 milion PLN (Ministerstwo Pracy i Polityki Społecznej, 2015).

The interest of ASOS Programme has been grown constantly from the beginning. In all three editions the greatest number of applications were submitted by the organisations from Masovia, Małopolskie and Lower Silesia regions. In 2014 only 3% of projects proposals were prepared in the partnerships. The different types of organisations submitted applications, most of them were nongovernmental associations (66%), foundations (27%), not to many chuntries (3%) and several social cooperatives (2%) and others (1%) (Ibidem).

In all three editions of the ASOS Programme the second priority: Social activity promoting intra and intergenerational integration attracted the most number of applications. In the third edition of the Programme the needs and opinions of the beneficiaries were not collected and examined.

Most of the supported projects were aimed at meeting of the direct needs of elderly people. Much less were oriented to increase the direct activity of seniors and their better integration by actions with local communities (Ministerstwo Pracy i Polityki Społecznej, 2014).

Some evaluation procedures were elaborated and implemented for the several projects co-financed under the ASOS Programme. They show us that the aims of the projects and the general objectives of the Programme

were achieved and they finished with success (Skośkiewicz, et al., 2015). As a result of the projects implementation the level of social activity of Polish seniors increased and the participation in the social and voluntary activities improved the standard of living the beneficiaries of the projects. These evaluations examined also the level of contentment of people who were involved in the projects (Fundacja Pracownia Kompetencji, 2013). In some cases the recommendations for further possible actions were formulated, inter alia: deeper cooperation with local community, participation of elderly people in the process of design the educational services for them as the main stakeholders of the ASOS Programme (Skośkiewicz et al., 2015).

This type of evaluation based on the services users opinions was made for our case study “Aktywni bez względu na wiek” project. The project operational management made the on-going evaluation of the project beneficiaries’ satisfaction systematically. The serious problems with implementation of the project were not perceived. The overall evaluation was made at the end of the project during the last meeting with project participants. The evaluation of the project by participants was positive, especially English classes, lectures and workshops about health and healthy nutrition and physical education and activities. According to the final report from the project implementation all assumed aims were achieved (Towarzystwo Edukacyjne Wiedza Powszechna, 2015). There is no information about the methodology of the design and implementation of the evaluation process for the case study “Aktywni bez względu na wiek” project.

The methodological rigour is simple to assess because of the limited number and scope of the existing evaluations of the ASOS Programme. Non- academic bodies and institutions have made all of them and they have not have scientific character. Some of them are based on experts’ opinions without description of any methodological background. There are no studies and research results published in peer-reviewed journals, which evaluate and (or) assess the Programme, its implementation, effectiveness and results. Evaluations of the projects implemented under the ASOS

Programme have got internal character and they were made by organisations responsible for projects management. These evaluations do not have scientific character and there is no information about their methodological assumptions and background. The findings and conclusions presented in these evaluations were limited to the particular projects, which were not general and representative for all ASOS Programme.

The governmental institutions delivered the overall evaluations of the ASOS Programme. They presented the direct results of the ASOS Programme using the quantitative methods of evaluation. In the first two editions the needs and expectations of the beneficiaries towards the Programme were also evaluated. Although these evaluations have not have scientific background, it is estimated as the reliable source of data and information about the ASOS Programme.

3. Needs assessment

3.1 Introduction

This needs assessment analysis focuses on the questions of if and why the ASOS Programme and especially the “Aktywni bez względu na wiek” project are the proper responses to the social and individual needs and expectations of elderly people in Poland. The University of Wrocław research team examined what kind of individual and social challenges the Polish elderly people faced and whether there was a need for public

intervention in order to reduce the negative consequences of these challenges.

The growing number of elderly people in the age structure of the Polish society has been noted from the last decade. In 2014 15,3 % of the Polish population were people in the age 65 and over (Główny Urząd Statystyczny, 2016a: 3). This is a serious economic and political issue related to the directions of redistribution of public income and public expenditure. The demographic process of people ageing has got long-term character and its future consequences have been the object of many research analyses. There are two main causes of the ageing society processes: the average life expectancy is longer than previously and the birth rate has decreased in recent years. According to the GUS data, the estimated percentage of the population aged 65 and over will be 23,2% in the age structure of Polish population in 2035 (Główny Urząd Statystyczny, 2009). The phenomenon of „double ageing of population” is foreseen which means that the faster growth the number of population aged 65 and over will be observed and at the same time the percentage of people aged 80 and over will raise. It is worth mentioning that the individual and social needs of different age groups of seniors population are diversified. It will be the real challenge for social investment policy, its financial capabilities and flexibility.

The needs assessment analyses relate to the senior citizens in Poland as a target population of active aging policy. Main existing needs assessment of the Polish seniors were investigated in order to understand if the active ageing policy and especially the ASOS Programme are useful in meeting the defined needs and expectations.

This needs assessment analysis is divided into three main sections. In the first one, the group of the Polish elderly people as the target population of ageing policy was described. In the second the investigation of existing needs assessment was delivered. The University of Wroclaw research team described, examined and evaluated the existing needs assessment and its methodological correctness. The third part was devoted the issue of new needs assessment.

Methodology

This is covered by the literature and previous existing evaluations analysis. The University of Wrocław team used quantitative data, which were obtained from the Główny Urząd Statystyczny and the Ministerstwo Rodziny, Pracy i Polityki Społecznej as well as the reports prepared by different public and non-public institutions and non-governmental organisations about the issue of ageing and senior policy in Poland. The significant source of data was the scientific report prepared by the Instytut Pracy i Spraw Socjalnych (Institute of Labour and Social Studies) in December 2012 about the situation of elderly people in Poland, especially the evaluation of elderly people' needs and expectations in the following areas: long-term care needs, social activity and integration. Other research conducted at local and regional levels were quoted.

In order to complement the quantitative data and have a deeper knowledge about elderly people needs, additional qualitative interviews with the beneficiaries of the “Aktywni bez względu na wiek” project were done. This information was supplemented by the individual semi-structured interview conducted with the project’s “Aktywni bez względu na wiek” coordinator and individual, semi-structured interviews with the services deliverers.

Methods

Quantitative methods

- Secondary quantitative data (from public and non- public institutions and non- governmental organisations collecting data about elderly people social needs in Poland)
- Documentation of the “Aktywni bez względu na wiek” project
- “Aktywni bez względu na wiek” project’s evaluation

Qualitative methods

- Individual, semi-structured interviews with the representatives of the beneficiaries of the “Aktywni bez względu na wiek” project - 6 interviews
- Individual, semi-structured interviews with the service deliverers the “Aktywni bez względu na wiek” project- 4 interviews
- Individual, semi- structured individual interview with the “Aktywni bez względu na wiek” project coordinator.

3.2 Existing needs assessment

3.2.1 Target population

There are some basic notions used in public statistics and scientific reports in Poland that are important in the context of the analysed subject, including: population aging – a process of increasing the percentage of elderly in a given population. In the research the University of Wroclaw team recognised that different age boundaries are used in the literature, official documents and statistical data in description seniors as the age group. The elderly are the people who are 60 or 65 and over, which is connected with retirement age and the receiving a pension in Poland. Chronological age threshold is also in line with this which is adopted by the World Health Organisation threshold of 60 years and established by the United Nations and Eurostat threshold of 65 years.

However, for most of the databases and the analyses subgroups are also selected. The group of elderly people is split into equally sized age groups of elderly individuals: 60-65 years, 65-69 years, 70-74 years, 75-79 years, 80 and over.

One of the most significant official reports in Poland, *Raport na temat sytuacji osób starszych w Polsce* prepared by Instytut Pracy i Spraw Socjalnych, defines a senior as any person who exceeded 65 years. The authors of the report suggest that adopted chronological dimensions is arbitrary and 60+ used in previous research and analyses as the age limit considering lengthening of the human life and the tendency to raise the retirement age, this limit seems to be more justified (Błędowski, Szatur-Jaworska, Swede-Lewandowska, Kubicki, 2012: 33).

The population of elderly in Poland

At the end of the year 2014 Polish population was 38.5 million inhabitants, including more than 8.5 million people over 60 years and older (over 22%). In the period 1989-2014 the number of elderly people increased by more than 2.9 million, including the biggest increase (about 1 million) that was recorded for the group of 60-64 year old. The share of people aged at least 60 in the general population increased by 7.5 percentage points, that means from 14.7% in 1989 to 22.2% in 2014 (Główny Urząd Statystyczny, 2016a).

In the subpopulation of elderly the largest group (nearly one third) were people between 60-64 years old. In the last 25 years the number of the sub-population of elderly people between 60-64 years old increased by almost a half. However, the highest growth rate was recorded in the group of individuals aged at least 80 years. Their share in the total Polish population is small, but it doubled - from less than 2% in 1989 to 4% in 2014 (the size of approx. from 753 thousand to 1529 thousand people).

Table 2.1. The population aged 60 years and over in 2014

Age	Total	Men	Women
Total population [in thousands]	38478,6	18619,8	19858,8
60 years and more [in thousands]	8547,8	3515,8	5032,0
in % of total population			
60 years and more	22,2	18,9	25,3
60-64 years	6,9	6,7	7,2
65-69 years	5,1	4,7	5,5
70-74 years	3,2	2,7	3,6
75-79 years	3,0	2,3	3,6
80 years and more	4,0	2,5	5,3
65 years and more = 100%			
60-64 years	31,3	35,3	28,4
65-69 years	23,0	24,9	21,8
70-74 years	14,4	14,4	14,4
75-79 years	13,4	12,2	14,3
80 years and more	17,9	13,3	21,1

Source: Główny Urząd Statystyczny, 2016a: 3.

A considerable predominance of the number of women over the number of men is visible in this group of older population in Poland. Women constitute the majority (59%) of the total population over 60 years old. In Poland, in 2014 there were 143 females per 100 males (the feminization rate is 106,6 for the entire Polish population (EUROSTAT, 2016). The superiority of women increases with the aging of the population. For example, in the group 60-64 years-old, women represent 54% of the population and the feminization rate is 125, and among the at least 80-year-old it is 70% which means that 228 females are per 100 males.

The phenomenon of feminization of old age is related to the phenomenon of excessive male mortality occurring in Poland² and diversity of life expectancy parameters (Adamczyk, 2015: 8). According to the data contained in the "Forecast of the population for the years 2014-2050," elaborated by the Główny Urząd Statystyczny, the phenomenon will be maintained at a high level for the nearest years. In 1991 it amounted to - 9.2 years, between 2006 and 2008 - 8.7 years. In 2013, the rate had dropped to 8 years (Główny Urząd Statystyczny, 2014: 73).

The feminization of old age will also have specific consequences for the aims and instruments of senior policy. If only because of the fact that female's pensions are generally much lower than the male's ones. The process of "double aging" is also visible. It means that the fastest growing group of seniors are people who are over 80 years old (Błędowski, Szatur-Jaworska, Swede-Lewandowska, Kubicki, 2012: 6).

The population of the elderly in Pomorskie voivodeship and Gdańsk

The population of elderly citizens in Pomorskie voivodeship in 2014 was over 481 thousand. According to the Główny Urząd Statystyczny, 20,9% of the total population has exceeded 60 years.

² Excess mortality in the language of the concepts used in official statistics is the mortality rate of people showing a significantly higher mortality rate than another, or several other groups. The indicator is a measure of the relative excess mortality, expressed as a percentage as a ratio, eg. death rate of men to women. GUS Information Portal <http://old.stat.gov.pl/gus/definicjePLKHTML.htm?id=POJ-3089.htm> [access: 2016-06-12].

Table 2.2. The population aged 60 years and over in Pomeranian voivodeship in 2014

Age	Total	Men	Women
Total population	2302077	1121987	1180090
60 years and more	481349	203512	277837
60-64 years	157076	73564	83512
65-69 years	113148	51428	61720
70-74 years	68177	28936	39241
75-79 years	62726	24203	38523
80-84 years	45535	15975	29560
85 years and more	34687	9406	25281
in % of total population			
60 years and more	20,9	18,1	23,5
60-64 years	6,8	3,2	3,6
65-69 years	4,9	2,2	2,7
70-74 years	3,0	1,3	1,7
75-79 years	2,7	1,1	1,7
80-84 years	2,0	0,7	1,3
85 years and more	1,5	0,4	1,1
60 years and more = 100%			
60-64 years	32,6	36,15	30,1
65-69 years	23,5	25,27	22,2
70-74 years	14,2	14,22	14,1
75-79 years	13,0	11,89	13,9
80 years and more	9,5	7,85	10,6

Source: Own elaboration based on Główny Urząd Statystyczny, 2016b.

In 2014, 25,5% of Gdańsk citizens has exceeded 60 years. It was over 117,5 thousand people. According to the Statistical Bulletin Pomorskie voivodeship, the greatest group of elderly is 70 and over.

Table 2.3. The population aged 60 years and over in Gdańsk in 2014

Age	Total	Men	Women
Total population	461489	218668	242821
60 years and more	117526	48485	69041
60-64 years	35699	16096	19603

65-69 years	27657	12184	15473
70 years and more	54170	20205	33965
in % of total population			
60 years and more	25,5	22,2	28,4
60-64 years	7,7	7,4	8,1
65-69 years	6,0	5,6	6,4
70 years and more	11,7	9,2	14,0
60 years and more = 100%			
60-64 years	30,4	33,2	28,4
65-69 years	23,5	25,1	22,4
70 years and more	46,1	41,7	49,2

Source: Own elaboration based on Główny Urząd Statystyczny, 2016b.

Taking into consideration the data from national, regional and local level, the process of population ageing in Poland is characterized by a number of significant processes. One of them is the high proportion of older people engaged in single-person households. This process is associated with loneliness, increases the risk of social exclusion, such as in the case of limited independence. The second characteristic is the feminisation of aging (*Long-term Senior Policy ...*, 2013: 7).

Senior citizens as a target population in different studies

Currently, in the Anglo-Saxon and in the Polish scientific literature old age is divided into three phases:

- *the young-old* - those aged 60 / 65-74,
- *the middle-old* - those aged 75-84,
- *the oldest-old* - those aged 85.

Delineating sub-groups in the 65 and over population enables more accurate portrait of significant life changes. The “young-old” are usually fully both physically and mentally operational. People categorized as “middle-old” usually require assistance in carrying out of certain activities of daily living, such as shopping, cleaning, laundry. The “oldest-old” people are usually in need of constant assistance in carrying out most activities. People in this age are potential clients of institutional forms of

assistance (Błędowski, Szatur- Jaworska, Swede-Lewandowska, Kubicki, 2012: 16).

Główny Urząd Statystyczny in Poland provides statistical information also on elderly in Poland, defined mainly namely over 60 years (Główny Urząd Statystyczny, 2016a; Główny Urząd Statystyczny, 2014).

In the analyses conducted by the Instytut Rozwoju Służb Społecznych two categories of seniors have been highlighted. The first of them are people 65+ and the second category including people 80+. In the case of 65+ sub-group, the knowledge required for the estimation of the overall level of demand for services and benefits is based on the number of percentage share in the local community, place of residence (city, town or village), livelihood or education level. In the case of 80+ sub-group the knowledge about the needs can be used for better organization of the living and social services, as well as improving the access to healthcare facilities and social assistance (Instytut Rozwoju Służb Społecznych, 2010: 11).

In some cases the elderly are defined as people of retirement age, which for women is 60 years and for men 65 ³ (Tomczyk, Bednarczyk, Opęchowska, Łątka, 2013: 6). This division is justified because the needs and the problems experienced by the members of both of those sex-groups are different. Part of research describe the seniors' population as a group of people at the age of 60 and over (*Jesień życia ...*, p: 8; Durska, Barszcz, Ciok, Rackiewicz, 2012: 25). Although the scientists recognise the different age sub-groups among seniors population, some research does not take this fact into consideration .

Definition of the target population in ASOS Programme

Senior policy is generally a package of actions performed by public administration at all levels and other institutions and bodies including non-governmental organisations that perform tasks and initiatives shaping the conditions of dignified and healthy aging (*Long-term Senior Policy ...*, 2013: 8). In the ASOS Programme 2012-2013 and 2014-2020 the target population is defined as all elderly at the age 60+ (Ministerstow Rodziny,

³ Retirement age in Poland in 2014

Pracy i Polityki Społecznej, 2014: 9). There is no further division of the general age group into sub-groups which have been noted in the other reports and studies about seniors in Poland. The ASOS Programme does not recognise the differences in needs between seniors from urban and rural areas and the potential differences in needs of two sex- groups have not been considered as well. Seniors have been described as a one age group of people at age of 60 and over. Although the Programme mentions that the seniors group is divided and it has the consequences for the abilities of elderly people to participate in voluntary activities, there is no additional information or data about these divisions.

Such a broad definition of the target population in ASOS Programme brings another problem connected with the unintended consequences, such as the deadweight. It appears when the change in the situation of people covered by intervention occurs even if the intervention had not taken place. There can be the situation that the support will be dedicated to those, who really would manage without it. This is mainly due to the fact that the main target population defined in the ASOS Programme could be very active group of elder population, which still seek for more proposals to meet their expectations and needs. The deadweight is not the only one limit of the ASOS Program. One should consider whether such a general definition of the target population would not charge the Programme to potential substitution effect. If so, which of the groups in the case of the Programme implementation will lose most (for example: if not disturb on "competitiveness" among the elderly and that those who do not receive support will not be "pushed out" by people covered by the intervention).

Definition of the target population in the "Aktywni bez względu na wiek" project

Towarzystwo Edukacyjne Wiedza Powszechna has clearly identified target population in the "Aktywni bez względu na wiek" project documentation. The project was dedicated for 60 senior citizens at age 60 and over residing in Gdańsk. The project was also aimed primarily for the

people who were disadvantaged materially, disabled or in a difficult family situation, at risk of exclusion both retirees or the people who were not employed (*Oferta organizacji pozarządowej...*, 2015: 8). The following criteria decided about qualifying for the participation in the project :

1. reaching the age of 60 or over,
2. residence in Gdańsk,
3. proven difficult situation.

The project was also aimed at the elderly, for whom the formula of the University of the Third Age was too ambitious and difficult. However, these seniors could be active and participate in lifelong learning to the extent adapted to their abilities. Major interest in the University of the Third Age formula caused that higher education had become the informal condition of acceptance. Those who did not meet this criterion were left on the reserve list, which in practice meant impossibility to benefit from these activities. Therefore, the “Aktywni bez względu na wiek” project was directed to those seniors who, because of lack of higher education, could not take advantage of the offer of the University of the Third Age.

There are several Universities of the Third Age in Gdańsk. The number of students is about 2000 people, mostly with university graduates, with the vast majority of women. They offer classes at a university level, requiring university education, high motivation and performance. They are exclusive and the students need to pay a modest fee. The beneficiaries of the “Aktywni bez względu na wiek” project were then the people who could not participate in activities organized by the University of the Third Age in Gdańsk not only with the formal reasons but also due to the difficult financial situation and low income, could not bring additional charge for participation in such activities. Thus, the “Aktywni bez względu na wiek” project was aimed to meet the needs of people who were also not able to participate in the University of the Third Age activities because of their financial limitations.

The project beneficiaries were recruited in all neighbourhoods of Gdańsk through active recruitment based primarily on direct contacts. Particular attention was devoted to degraded areas in Gdańsk. Candidates

reported by completing the survey recruitment, then the interviews that evaluated their educational needs and abilities were carried with them. Equality between women and men, according to which the percentage breakdown of the numbers of participants was equal (the half of the representatives of each sex) and declared in the process of requirement. However, due to the low interest in the project among men, women were bigger group of the participants of the project.

Miejski Ośrodek Pomocy Rodzinie (Municipal Family Support Centre) and Okręgowy Związek Emerytów i Rencistów (Local Association of Pensioners and Annuitants) from Gdańsk were involved in the process of defining the target population. Miejski Ośrodek Pomocy Rodzinie is the public institution that is engaged in care services delivering for the elderly who are in a difficult financial situation; the Association of Pensioners and Annuitants associate the elderly and disabled.

The target population of the “Aktywni bez względu na wiek” project was clearly defined. Moreover, the description of the target population of the project was based on the available data on social indicators of the elderly in Gdańsk, as well as the social strategies of the active ageing policy in Gdańsk, as well as in Poland.

3.2.2 Population needs

Population ageing is a continuous and fast growing challenge for the society in Poland because it increases the demand and need for acute and long-term care and strains pension and social security systems. In contrast, the Polish elderly population can contribute to its communities as family members (i.e. having caring responsibilities), volunteers and as active participants. The balance between these challenges and opportunities will be determined by how the Polish society and the government will respond to the elderly people needs and problems. The link between the life stages and the hierarchy of needs shows that basic and higher needs are independent of age and the life stages. However, if we take into account the criterion of age, we can conclude that the needs

of the elderly people differ from those of young people, above all the fact, that there are less of them and the degree of the satisfaction from meeting the needs of seniors depends on their economic and socio-cultural situation (Kubiak, 2016: 197). Moreover, according to a number of studies, in old age the value of the gain material needs increased and the need for security and emotional support is more important (Woźniak, 1997: 83). The consequences of ageing, especially in the old-old stage, are visible in the group of needs connected with physical ailments, as well as the need for care and support from family and/or institutions. As above noted, the elderly people feel a strong need for acceptance and activity in everyday family life, as well as in local community. There are therefore three main areas of meeting the needs of the elderly: (1) material and existential well-being, (2) physical health and (3) the associated sense of belonging (affiliation) and identification (friendship and social life) (Błędowski, 1996: 108).

The needs of seniors diagnosed in different studies

In 2009 Główny Urząd Statystyczny conducted the study on the care needs of elderly people in Poland. The survey was carried out among people living in the family households and did not include residents of care facilities and other collective households. Among people sub-group aged 70-79, every fourth (while among people aged 80 and older - almost every third person- 30.7%), did not see the prints in newspapers or saw them with great difficulty. 6.2% of population 70-79 years and 16.6% of population aged 80 and over heard the conversation between several people with great difficulty or did not heard at all. 40% of population aged 80+ was not able to move heavier bags (even over short distances), every fourth person could not bend down or kneel and enter or climb down the stairs to another floor. Every fifth person could not go alone 500 meters. In 2009, the difficulty of personal care (for example washing, dressing) was related to every fourth person in the group of 70-79 years and a third in the group of 80+. Serious limitations occurred most frequently among the group of old-old. - 14.6% of population 80+ experienced serious problems in everyday life activity. The potential need for patients care in the group

of 70 years and over was in 2009, more than 1.3 million people (Główny Urząd Statystyczny, 2011).

Research concerning the needs for health and care services for the elderly in Poland, are usually conducted surveys relating to the needs of this population. The scale for meeting these needs is usually correlated with the capability of providing them by the public authorities or non-public organisations but not with the actual needs of the elderly.

There are also diagnoses of psycho-social needs of elderly people, which include security need, in the sense feeling the threat of social pathology at the place of residence. The second group of needs in this area is related with the religious needs. 3/4 of older people at least once a month take part in the church service (15% of population 60-64 and 19% of 65+ even more than 4 times a month). The level of satisfaction of the religious needs is therefore very high in Poland. Unlike individual prayer, participation in religious meeting caters not only religious needs but also the needs of social contacts (Instytut Rozwoju Służb Społecznych, 2010: 41).

The needs of older people in terms of psychological services were also estimated in Polish research. They were carried out on a sample of over 1,000 respondents. The least desirable service was the implementation of programs developing intervention and support services for seniors. The support groups for elderly people experiencing violence had also relatively little approval among respondents. The most desired service was to carry out the intervention/emergency aid for the elderly and their families/carers. On the other hand, less than 13% of respondents did not see the need to implement this service. In the opinion of respondents taking part in the mediation in cases of conflict between generations in a family with an older person was also very important. Almost every second respondent declared the need for implementation of this service, while only 13% of them did not see the need for the implementation of this service. Providing assistance and support for elderly people addicted to drugs and members of their families was indicated by 45% of respondents, while 18% of seniors did not see the

need to implement such services (Ibidem: 92-93).

Instytut Rozwoju Służb Społecznych also conducted a survey on the needs of seniors in the field of activities aiming to increase the sense of security of older people. Respondents pointed to the great importance of legal advice for the elderly (as the activity increasing the sense of security) and the need to remove barriers in the physical environment (in the apartments of the elderly) aimed at maintaining security and independence of life of seniors (Ibidem: 102).

In Poland there are also needs assessments made on the regional level. One of the examples can be the survey conducted by the Regionalny Ośrodek Polityki Społecznej (Regional Centre of Social Policy) in 2013 in Toruń. The aim of the survey was to investigate the needs of assistance of the elderly people from the Kuyavia- Pomerania voivodeship. The study showed that elderly people who participated in the interviews needed some help in preparing meals (19.4% of all respondents, including a majority of men answered "every-day or almost every day), in shopping (17.8% of all respondents), in daily activities such as washing, dressing (11.5%), but also in terms of heavier houseworks (5.6%) (Tomczyk, Bednarczyk, Opęchowska, Łątka, 2013: 52). The study referred also to the use of new technologies among elderly people. Analysis of the data showed that seniors often did not use mobile phones (39.8%), but there was equally large group of those who used it once a week or more often (33.4%). In addition, elderly people mostly did not use a computer (74.7%) and the Internet (75.2%), as well as credit card (68.0%). It must be said that good knowledge of new technologies and the frequent use of them is not very common among the elderly people. Those who did not use the new technologies explained this fact that they did not have the need to use this kind of electronic devices or did not know how to use it or have concerns about the use of such electronic devices (Ibidem: 74-75).

The need for services for the elderly people in the area of recreation and interests development was also present among the respondents. The greatest needs of seniors in this area were: tourism and recreation (for example: trips), meetings with interesting people, art courses (for

example: painting, music) and physical activities (dancing, gymnastics, the Nordic walking). The least popular activities were: foreign languages learning, sports games and cultural studies classes (Ibidem: 111).

Analyses of the needs of seniors in the area of social activity were carried out by the organization Centrum Pomocy i Aktywności Osób Strasznych w Nowej Rudzie (the Centre of Support and Activisation of Eldery People in Nowa Ruda) in 2013. The ASOS Programme co-financed the survey and publication of its results. 101 individuals and 35 experts covered the study. The status of pensioner became the criterion applied in the selection of the respondents. Hence, the survey was carried out on different groups of population from 55 to 75 and over (*Jesień życia...*, 2013). The survey had got local character and was conducted in several localities (Nowa Ruda, Tychy, Mikołów, Świętochłowice, Chorzów, Katowice, Rybnik, Łaziska Górne, Siemianowice Śląskie). The questions in the survey were connected with the type of activity that seniors would like to take and which they had not taken ever before. Most indications were related to the desire of travelling around Europe and the world (17%), volunteering (14.3%), using a computer and the Internet (9.6%), visiting places of culture as museums, galleries, exhibitions (9.5%), theatres, operas, going for concerts (8.8%), cinema (7.3%) and working for the local community (7.3%) (Ibidem: 35).

In this study the demand for services among Silesian seniors was examined. The greatest interest was noted in the following activities: prevention of diseases typical for old age, memory training, dietary services, tourism services tailored to the needs of the elderly, providing the elderly people leisure and sporting facilities on preferential terms, and training elderly people with new technologies (Ibid: 41).

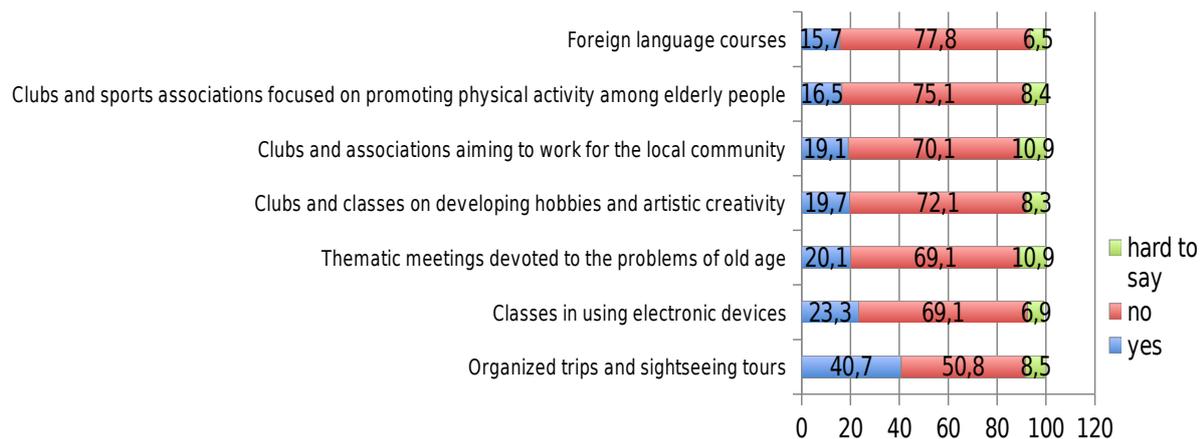
Research on elderly people's needs in the area of social activation has been also made at local level in Poland. One of the existing examples is the evaluation of the needs of elderly people in Radom made by Instytut Politologii Uniwersytetu Kardynała Stefana Wyszyńskiego w Warszawie (Institute of Political Science, University of Cardinal Stefan Wyszyński in Warsaw) in 2012. People older than 60 are the 12% of the population of

Radom. Needs assessment of elderly people living in Radom was based on questionnaires filled by 100 respondents. 40 of them were the members of the local senior club, while 60 people were randomly selected, encountered on the streets of Radom. The results of the study indicate that the majority of elderly people expressed the need for participation in activation programs, but only a few - about 11% would like to do it on a regular basis. When it comes to physical activities preferred by seniors, they had mainly chosen: ballroom dancing - 38.8%, sightseeing tours/walking - 15%, Nordic walking -15% and swimming - 11.7% (Durska, Barszcz, Ciok, Gros, Rackiewicz, 2012: 4). The results indicate that elderly people are mainly interested in maintaining physical fitness. Educational needs for new technologies were declared by a small percentage of the respondents, while spending time in the museum, cinema or theatre indicated approx. 8% of respondents (Ibidem: 28-30). Men were the group of seniors, with greater need for mental and intellectual development, while women tend to articulate their needs for keeping physical fitness and participation in cultural life.

In 2012 the survey on elderly people' life conditions was also made in Gdańsk, the place where the analysed case study "Aktywni bez względu na wiek" project was implemented. The report *Gdańska starość. Portret socjologiczny mieszkańców Gdańska w wieku 60+* was prepared by the research team from Uniwersytet Gdański (University of Gdańsk) in 2012. The survey gives significant results on the elderly people' needs in the terms of institutional actions towards active ageing. The results are presented below.

Graph 3.1. Preferences in willingness to participate in different forms of

activities addressed to the elderly people



Source: Czekanowski, Załęcki, Brosz, 2012: 124

Among the various activities indicated by respondents in the study, most elderly people would take part in organized trips and sightseeing tours - 40.7%. As the authors of the report suggested, the Polish pensioners still look with a certain envy to their peers in the Western developed countries, who often at the retirement age start to their tourist tours (Czekanowski, Załęcki, Brosz, 2012: 123). And it is not about expensive trips abroad, but nostalgic visit and exploration the national interesting places.

As the second choice, respondents declared that they were interested in developing skills in the using of electronic devices (23.3%). The rest of the activity aimed at the elderly people were at the similar level indication rates: 20,1% would attend the thematic meeting devoted to the problems of old age, 19,7% would attend the meetings in clubs and classes on developing hobbies and artistic creativity, 19,1% would attend the meetings in clubs and associations aiming to work for the local community. The smallest interest was for clubs and sport associations focused on promoting physical activity among elderly people (16,5%) and foreign language courses (15,7%).

The needs of seniors diagnosed in the ASOS Programme

The ASOS Programme focuses on meeting the needs of elderly people relates to both physical and social activities. The authors of ASOS Programme have assumed that the Programme is aimed at meeting the needs and interests of elderly people. In the documentation of ASOS programme there is no information on the source of the elderly people' needs assessment, which the Programme is based on. Nevertheless needs analyses of the target population of the ASOS Programme for 2014-2020 is based on:

- experience with the implementation of the ASOS Programme 2012-2013,
- cooperation with organizations implementing projects for the elderly people,
- a broad dialogue with representatives of non-governmental sector, universities, local authorities, central government, trade unions and employers' organizations, (Ministerstwo Pracy i Spraw Społecznych, 2014: 4).

The ASOS Programme indicates the two most important categories of needs of elderly people: first is the need for social activation of seniors and the need of providing high-quality care services (Ministerstwo Pracy i Spraw Społecznych, 2014: 24). ASOS Programme 2014-2020 has also constituted a response to the educational needs of Polish seniors, particularly for those who are excluded or at risk of social exclusion (Ibidem: 11). Implementation of the ASOS Programme has been evaluated in three reports prepared at the request of the Ministerstwo Pracy i Polityki Społecznej, in the following years: 2012, 2013 and 2014 (www.senior.gov.pl). None of them refers to the issue of elderly people needs assessment.

The target population needs in the project „Aktywni bez względu na wiek”

The answer to the question of the needs of elderly in Gdańsk was the objectively formulated in the project. The needs assessment for the second edition of the project was also based on the results from the first edition of the Programme. The project met the needs of people 60+ in a difficult situation, disadvantaged, enabling them through comprehensive

educational offer to acquire new knowledge and skills to function more efficiently in a changing world and maintain good physical, mental and intellectual condition (*Oferta organizacji pozarządowej...*, 2015: 8).

The project „Aktywni bez względu na wiek” aimed to meet the needs of elderly people less educated, in difficult financial situation, sometimes affected by a slight disability, risk of exclusion, who were able to be active but were not able to access the University of the Third Age. The needs assessment of the target population were diagnosed by two organizations: MOPR and Okręgowy Związek Rencistów i Emerytów.

The needs of the target population were correlated with the needs of people who were not able to advantage of the offer of the University of the Third Age and other commercial activities. Educational needs of the target population of the project beneficiaries were of a practical nature and concerned:

- the acquisition of skills in new technologies,
- the increase of knowledge about the health care,
- caring skills,
- acquire the knowledge of the law and economics, etc.

People from this group very often are digitally excluded. The service deliverers of the project pointed out that according to need assessment, many of the target population experienced the gaps within the competence of the ITC and English language, knowledge about their own health and the ageing process (*Oferta organizacji pozarządowej...*, 2015: 8). They did not know very often how to take care of themselves, and they quickly grew old, lost their physical condition, psychological and mental fitness and motivation. In addition, many of these people had a lack of confidence, low self-esteem and passivity (*Oferta organizacji pozarządowej...*, 2015: 8).

The project filled the gap, offering comprehensive support in addition to education and using active methods of recruitment, demonstrating practical benefits of education, counselling and participate in different activities. It was directed primarily to a group of people with disadvantage material family or disability situation. The target population was both

pensioners and people who were not employed (the size of this group is not precisely known, it is estimated at 15-20% of the population 60 +). The age of 60+ was recognised as difficult regardless of the previous situation of the person. Retirement is difficult period in the course of life of many people, they experience a sense of alienation from social life and they feel marginalized. Those who do not work feel the same when their children and grandchildren leave homes, especially if they live alone. It is often a reason for withdrawal of all mental activity and social passivity, intellectual and physical inactivity (for example spending time at home watching TV), which in turn causes the acceleration of the ageing process, "falling out" from the mainstream of life, rapid loss of intellectual and physical functions.

The service deliverers of the project noted that it reduced the number of social interactions, ties weaken, social life went out, the modern world became incomprehensible - began the process of social exclusion, which could interrupt or stopped by taking activity. That is why the planned educational activities aimed to served addition competence for the target population, preserving the good physical and mental health of seniors as long as possible, increasing the knowledge of taking health care and physical fitness. Psychological workshops and classes of geronto-kinesio-prophylaxis were aimed at improving the physical and mental condition. Integration activities were planned to allow for integration of the beneficiaries and overcoming the loneliness. To address the needs of advisory support the courses were organised in order to help in solving problems in the social, family and legal areas.

The service deliverers of the project organised also an open offer to take voluntary work aimed at stimulating the social activity that would allow seniors to use their knowledge and experience for the benefit of the local community. The project also included elements of education in old age, treated as a natural state and emotionally acceptable, learning how to keep fit, arousing activity and shaping a positive attitude towards beneficiaries' future.

The "Aktywni bez względu na wiek" project aimed to realise the principle of active ageing. For some beneficiaries (still working part time) the activities improved their qualifications (for example computer skills or English) and their position in the labour market and physical and mental health giving energy and motivation to work. The project helped to spend time people after 60 and over in an active, interesting and useful for the local community way.

The needs of the target population in the "Aktywni bez względu na wiek" project recognized by Towarzystwo Edukacyjne Wiedza Powszechna were based on the following methods:

- three direct meetings organized with seniors in Gdańsk. During this meetings seniors expressed their needs and expectations towards the planned project activities
- consultation with organizations representing the interests of the poorer parts of Gdańsk seniors: Miejski Ośrodek Pomocy Rodzinie w Gdańsku, Okręgowy Związek Emerytów, Rencistów i Inwalidów w Gdańsku as well as local non-governmental organizations working for seniors in Gdańsk,
- information from the people responsible for the organization of the University of Third Age in Gdańsk on the needs of a group of seniors who could not attend the courses offered in the frames of the University of Third Age
- interviews with seniors expressing the willingness to participate in the "Aktywni bez względu na wiek" project, in order to recognize their educational and social needs.

Based on the interview with the coordinator of the "Aktywni bez względu na wiek" project we recognised that that the organization Towarzystwo Edukacyjne Wiedza Powszechna developed different activities for elderly people in Gdańsk for 15 years. It can be assumed that the organisation has a good orientation on the target population needs. With the development of the activities in the frames of the "Aktywni bez względu na wiek" project, previous experiences and observations, which

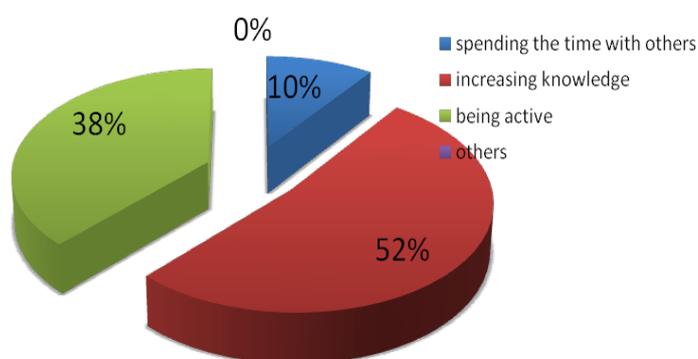
were the results of long-term and systematic activities of the organization in this environment were also taken into account.

Furthermore, during the project implementation the needs were constantly evaluated and the offered classes were updated and adapted to these needs of beneficiaries. Regular monthly meetings were held with the participation of evaluation coordinator, psychologist, counsellors, coaches and participants of the project, aimed at solving current issues, but also to update the Programme to meet the participants' needs.

During the project implementation several pre-pilot workshops were organised and tested. Their aim was to confirm the suitability for the needs of the project participants. The example can be the case of memory training course, which was introduced at the stage of pre-pilot workshop and after participants' acceptance was permanently implemented into the activities schedule carried out within the framework of the second edition of the "Aktywni bez względu na wiek" project.

At the end of the second edition of the project, all participants filled out evaluation questionnaires with the queries about their motivation to participate in the "Aktywni bez względu na wiek" project. The results of the survey are presented below.

Graph 3.2. The results of the survey on the motivation of participation in the "Aktywni bez względu na wiek" project.



Source: Towarzystwo Edukacyjne Wiedza Powszechna, 2015: 1.

3.2.3 Evaluation of previous needs assessment

The significant part of research about elderly people' needs was conducted in 2012 as the result of the European Year for Active Ageing and Solidarity between Generations established by the European Parliament and the European Council. This research was financed by the European Social Fund and its taking up was the consequence of political decisions made at the European and national level. Poland as the EU member state prepared the plan of actions in the framework of the policy of active ageing as the result of demographic processes and its influence on social situation and fiscal abilities of the government.

The methodology of the existing previous needs assessment is based on social investigation and its general aim is to diagnose existing problems, formulate conclusions and recommendations. The existing needs assessments of senior citizens' in Poland are conducted in order to elaborate recommendations for senior policy at local, regional and national levels. The significant part of research refers to the seniors' needs for care and health services, less part concentrates on the analysis of financial and social needs. Existing evaluations which focus on the elderly people' needs in the field of professional activity and the labour market situation are marginal. Nevertheless, the situation of elderly people in labour market has significant meaning for the needs meeting of them, especially the financial ones.

With methodological correctness of existing evaluations it is worth to mention that research conducted by the Główny Urząd Statystyczny and other research institutes is based on the proper selection of a representative sample. This selection reflects differences in age, education and place of living of the Polish seniors. The conceptualization and implementation of evaluation processes are also methodological correct.

In case of the existing needs assessment evaluations made by organizations, which implement projects for elderly people, also financed by the ASOS Programme, they do not have representative character in the national dimension. It is because they usually refer to the local level. It is

impossible to estimate their methodological rectitude owing to the fact, that only their results are available. We do not have access to the information about methods and techniques used to their implementation. Moreover, it is probable that that evaluations of needs assessment made by organisations were oriented on justification for projects offered by them. Some existing needs assessment have been carried out on commission of the local, regional and national authorities, who are keen on seniors' needs as the recipients of active ageing policy. Based on the results of the needs assessment, the programmes supporting elderly people are created and implemented, especially in the fields of healthy and care and social needs. Among existing needs assessment the quantitative research is predominating, which is conducted by using a questionnaire.

The completed evaluations of the ASOS Programme did not refer to the needs assessment of the Polish senior citizens and did not verify the issue if the Programme fulfilled the diagnosed needs. In the ASOS Programme many needs of elderly people are enumerated but at the same time there is no information about the methodology of needs assessment. The authors of the Programme claim that these needs were assessed in the process of wide consultations with institutions and organisations active in the group of elderly people. However, there is no qualitative and quantitative data, which confirm the existence of the needs. Three evaluations of the ASOS programme which have been done so far, refer to the assessment the system of its implementation and the successes and challenges met by institutions and bodies who have received support from the Programme.

In case of the "Aktywni bez względu na wiek" project the needs assessment of the senior citizens' have been done correctly and the project was the response on the examined existing needs and problems. The organisation responsible for project implementation diagnosed the needs of the seniors from Gdańsk by using different methods to reach the target group. The project had been evaluated during the all period of its implementation but at the end of the first edition there was no holistic

report summarizing if the needs of beneficiaries were met. At the end of second edition of the “Aktywni bez względu na wiek” project using the questionnaire filled by all beneficiaries made the overall evaluation of the project. It made possible to recognize further educational needs of senior citizens’ from Gdańsk and it is an important source of information how to develop future initiatives for this age group. The correctness of needs assessment process was entrenched by organizing the regular evaluation meetings, where beneficiaries could perform their expectations and opinions. Based on the meeting results the project management kept up with seniors needs and could respond to them. The propriety of needs assessment made by project’s coordinator was confirmed by beneficiaries who claimed that the project fulfilled all their needs, especially have new skills and social contacts and being active.

The general trend of the feminization the ageing processes of the Polish society had the negative influence on the declared selection of target population, which was based on the principle of gender equality. The implementation of this rule was not possible for two reasons. First because women were the group which was more interested and motivated in social activation and participation in the project than men. Second, because there is majority of women in the age structure of individuals at age 60 and over in the Polish society.

3.3 New needs assessment

Existing needs assessment give enough information about needs and expectations of senior citizens in Poland. They perform a picture of the oldest group of the Polish population and are the reliable source of data for public policy makers and public officers responsible for senior policy implementation.

The recommendation of the InnoSI research team is to conduct such kind of studies on a regular basis and updated empirical data in the field of recognition of the needs of older people. The extension of the research topics towards recognition of social needs of elderly people would be

useful because a large part of the existing research is concentrated on the health care and material needs.

It might be worthwhile to take up such studies in small local communities, not only at the macro level as regional or national one. This would allow a better understanding of the needs of elderly people in relation to the local community in which they live. The InnoSi research team found important to point that the labour market needs of the elderly people is one of the thematic areas unrecognized in the analysed studies. This subject of such research goes beyond the thematic scope of the case study analysed in the frames of InnoSI project. However, we are confident that there is the necessity for studies that would take into account the dynamics of the changes in such kinds of needs, which would allow predicting the trends prevailing in the future.

A small amount of qualitative data on the elderly people's needs leads to the recommendation that future research should address the in-depth analysis of the needs assessment using qualitative methods. Qualitative research not representative for the whole population of elderly people, usually allow for better understanding not only the nature of the elderly people's needs, but also their causes. It also helps to develop better ways to satisfy them.

In case of the ASOS Programme, which is the funding source for the "Aktywni bez względu na wiek" project, it seems to be necessary to conduct quantitative research with the aim to estimate the real needs of elderly people in Poland. We recommend the study in order to determine the priorities of the Programme and the amount of financial expenditure to implement them.

4. Theories of change

4.1 Introduction

The Theory of Change is a methodological background for the examination if the goals of the ASOS Programme have been achieved and analysis what is the impact of the Programme on the senior citizens' who are defined as the targeted group of its intervention social activity and social integration. According to the theory of change not only mechanisms of the implementation of the Programme but also the values should be considered. Development of the theory of change in this case study "Aktywni bez względu na wiek" project has got retrospective character because the project is finished. We have used stakeholder-led process in which stakeholders' perception is the central for generating collective vision of the project.

The theory of change delivers the analytical framework for the process of evaluation of the ASOS Programme and our case study project. We have used the existing theory of change in the evaluation processes at two levels:

1. SWOT analysis for the ASOS 2014-2020 Programme by examination all documentary of the Programme, existing evaluations and all accessed quantitative data. We have defined strengths and weaknesses of the Programme as well as opportunities and risks in the context of the main goal, which is defined as the raise of social activity of the elderly people in Poland. We have examined if the assumptions of ASOS are realistic. The assumptions of the ASOS Programme defined by the Ministry of Labour and Social Policy have been adapted to our analyses.
2. Evaluation of the case study "Aktywni bez względu na wiek" project as the example of the ASOS Programme implementation. The theory of change have been utilised to explain what kind of outputs were created by the project and if and what kind of change(s) turn out. The University of Wrocław team is assessing the issue, which should be, solve by the project implementation, engaged resources and expected results. We have found the answer for the question if

desired change in social and personal development of the project participants had existed and if the goals of the project had been achieved. This analysis contained:

- identifying general goals of the ASOS Programme which is the legal and financial framework for “Aktywni bez względu na wiek” project implementation,
- identifying main objective and the specific aims of the “Aktywni bez względu na wiek” project
- identifying the preconditions or requirements necessary to achieve the projects’ objectives
- identifying all activities and tasks which were taken up in the project in order to achieve the aims
- identifying all inputs (financial, human, organisational, management, time) used in the project implementation
- identifying of the project outputs by the system of indicators which show us if the changes in the area of social and personal development of project participants has happen
- identifying if the existing changes are the same or different in comparison to what was anticipated
- identifying what kind of influence the project outputs have on the general goals of the ASOS Programme achievement

Methods used in the examining the existing theory of change:

- Review of the ASOS Programme documentation
- Review of the “Aktywni bez względu na wiek” project documentation
- Individual, semi-structured interviews with the coordinator of the “Aktywni bez względu na wiek” project
- Individual, semi-structured interviews with beneficiaries of the “Aktywni bez względu na wiek” project
- Focus interview (group) with the beneficiaries of the “Aktywni bez względu na wiek” project

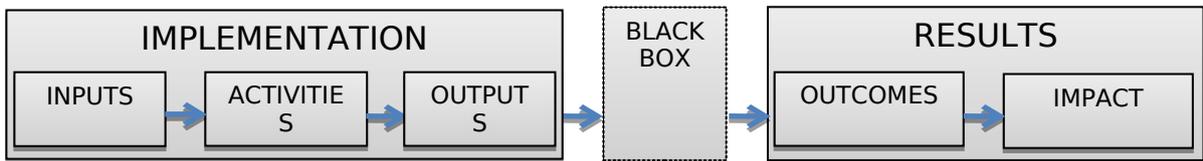
4.2 Existing theory of change

Theory of change models typically have five main components: inputs, activities, outputs, outcomes, and impacts (Figure 4.1.).

The existing theories of change for the elderly people in Poland is articulated, behind the senioral policy framework, ASOS Programme, Senior-Wigor Programme and the every project implemented in the frames of the senioral policy. The theory of change of the ASOS 2014-2020 Programme is based on the stakeholder-led process. It refers to key stakeholders role and perception of the stakeholders of the program. The ASOS Programme is focused on achieving the positive changes in the population of elderly people in Poland. In the ASOS Programme documentation there is some explanation how the intervention is expected to produce the changes and desired results. However it introduces some of the key concepts of stakeholder-based approaches to theory of change. Especially it refers to the change that is desirable in the elderly people social activation in Poland.

In our case study we have focused on the theory of change as the “black box” to show how “Aktywni bez względu na wiek” project expects to convert inputs, activities, and outputs into outcomes design in ASOS 2014-2020 Programme.

Figure 4.1. Moving from Inputs to Results.

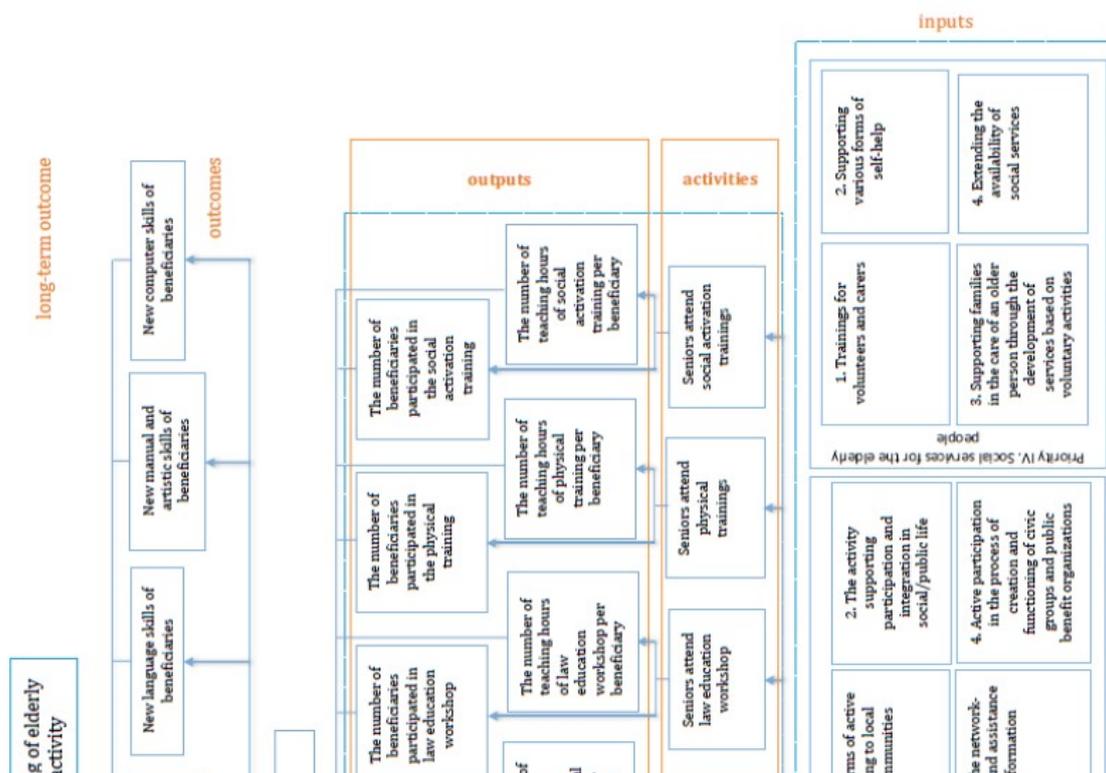


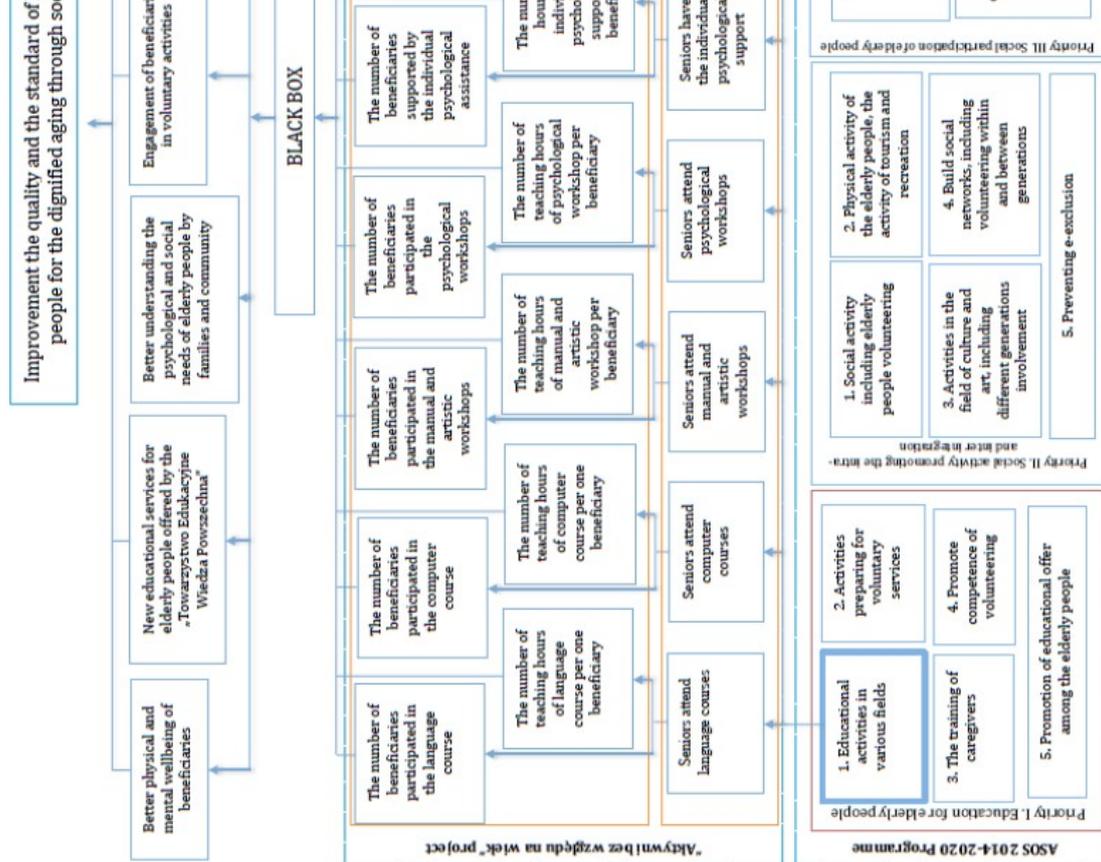
Source: Adopted from Imas and Rist, 2009: 110.

A pathway of change is a map that illustrates the relationship between the ASOS Programme implemented in n=1 case study (which is the “Aktywni bez względu na wiek” project) and the outcomes of “Aktywni bez

względu na wiek” project (which have a direct link with the long-term outcome of ASOS Programme 2014-2020)

Figure 4.2. Logic model of ASOS 2014-2020 Programme and “Aktywni bez względu na wiek” project





Source: own research

There is a strict link between the ASOS Programme 2014-2020 and the ASO

S Programme 2012-2013 in the frames of the theory of change. The main result of the ASOS 2014-2020 was design as "Improve the quality and the standard of living of elderly people for the dignified aging through social activity".

The Programme logic of design the interventions is based on the process of analysing the situation of elderly people in Poland based on:

- results and experience from the ASOS Programme 2012-2013 implementation,
- results of dialogue with organizations implementing projects for the elderly people,

- results of a broad dialogue with representatives of non-governmental sector, universities, local authorities, central government, trade unions and employers' organizations, (Ministerstwo Pracy i Spraw Społecznych, 2014: 4).

The impact of the ASOS 2014-2020 Programme was design as the long-term outcome, which was thus set as a long-term objective of the program. The main result has to be achieved through the detailed objectives of the Programme. They refer to the intended change by the lines of interventions. It is worth to notice that all of the changes were design to be measurable by using the quantitative methods. The short-term outcomes are as follow:

1. Increase of diversity and improvement the quality of educational services for elderly people
2. Creation the conditions for inside and intergenerational integration of elderly people by using existed social infrastructure
3. Development the diversified forms of social activity containing voluntary services, participation in decision- making processes and public sphere and the contribution of elderly people in public policy development
4. Increased access and quality of social services and support for activities in the area of self-organisation and self-help

The inputs of the ASOS programme are designed as interventions in the fames of two components implementation frameworks: the long-term intervention (systemic) and the short-term (competition).

They are also grouped in following priorities:

Priority I. Education for elderly people

1. Educational activities in various fields
2. Activities preparing for voluntary services
3. The training of caregivers
4. Promote competence of volunteering

Priority II. Social activity promoting the intra- and inter integration

1. Social activity including elderly people volunteering

2. Physical activity of the elderly people, the activity of tourism and recreation
3. Activities in the field of culture and art, including different generations involvement
4. Build social networks, including volunteering within and between generations
5. Preventing e-exclusion

Priority III. Social participation of elderly people

1. Forms of active aging to local communities
2. The activity supporting participation and integration in social/public life
3. The network-care and assistance information
4. Active participation in the process of creation and functioning of civic groups and public benefit organizations

Priority IV. Social services for the elderly people

1. Trainings for volunteers and carers
2. Supporting various forms of self-help
3. Supporting families in the care of an older person through the development of services based on voluntary activities
4. Extending the availability of social services (Ministerstwo Pracy i Spraw Społecznych, 2014: 10).

During the implementation of the ASOS 2014-2020 Programme assumed:

- co-financing of development and the creation of new learning opportunities for elderly people, increasing access to educational activities within the framework of existing and newly created organizations, among others, in disadvantaged areas, using the existing educational and cultural infrastructure for the elderly people,
- supporting various forms of education and learning to improve the skills of the elderly people, especially digital skills and in particular for persons who are a difficult situation, especially in the social exclusion process,

- raising the competence / qualifications of staff involved in professional and volunteer social activity of elderly people,
- financing of other forms of elderly people social activity,
- increasing the supply and improving the quality of social services for the elderly people, including the adjustment of the offer according to the needs and abilities of elderly people with disabilities or reduced mobility (Ministerstwo Pracy i Polityki Społecznej, 2014: 11).

There are several assumptions which make explicit why the ASOS 2014-2020 Programme can work. They have been considered by the use of SWOT analytical tool, which are as followed:

1. The ASOS 2014-2020 Programme is responding the changing demographic structure of Polish,
2. The Programme will have an impact on future financial and economic situation of the country, by its impact on the state of employment rate and the health care, social assistance system,
3. The Programme's target group, will be in future a significant social group in Poland,
4. The Programme has a chance to be developed in the future (Ministerstwo Pracy i Polityki Społecznej, 2014: 12).

In our case study we present how the outcomes of the ASOS Programme 2014-200 and the outcomes of the "Aktywni bez względu na wiek" project are related to each other over the lifespan of the ASOS intervention (See Figure 4.2.).

5. Process (implementation) evaluation

5.1 Introduction

In the process implementation evaluation we have verified the existing theory of change for the ASOS Programme, which was presented

in the previous chapter of the report. The scientific analysis of causes, casual mechanisms and links between the ASOS Programme intervention and the outcomes designed in the “Aktywni bez względu na wiek” project was taken up by the University of Wrocław research team in order to investigate how the project was implemented. Having the knowledge about the outcomes which have been produced in the project, the University of Wrocław research team wanted to verify what are the causes, casual links and mechanisms influenced on the project implementation and reaching of its results. By the process implementation evaluation we are going to establish the most important conditions which determine the ASOS Programme implementation and final success in reaching its main objectives. This research task is implemented by using process tracing approach in analysis of casual links between the programme intervention and outcomes produced in the “Aktywni bez względu na wiek” project.

The casual links and relations between the ASOS intervention and the results of “Aktywni bez względu na wiek” project are the key issues for understanding and explaining how and under what circumstances the public policy of seniors support in Poland works. This analysis has been done based on the one n=1 case study project and has taken into account contextual preconditions of project implementation. These contextual preconditions are determined not only by policy regulations and general framework of the ASOS Programme which are common for all the projects supported under the this programme but mainly by local social, institutional and cultural determinants in which the programme is implemented. It is the consequence of the fact that most part of the ASOS Programme is implemented locally by actors representing civil society. The structure, aims and priorities of the ASOS Programme have been established at the governmental level but the implementation has taken place at local one. In consequence of this type of programme arrangement, this process implementation evaluation for the “Aktywni bez względu na wiek” project is based on the analysis the local dynamics, driving forces and factors that influence on how the programme operates.

The evaluation of the process implementation of the “Aktywni bez względu na wiek” project has made it possible to define causes, casual links and mechanisms which were named together as the “black box” in the previous chapter of the report. Defining these mechanisms which contributing in producing the project outcomes means that “black box” will be opened up and the conditions of effective implementation of the considered project will be examined (Beach, 2012: 11). We are going to take into the consideration not only the objective facts and figures which influence the ASOS Programme implementation but also the subjective and contextual conditions, for example: the motivations of the elderly people for being active, the quality of the educational courses delivered by the TEWP or the contribution of different local actors in the project implementation which can also determine if and how the programme works. We assume that these factors play critical role in the process of reaching the project/programme objectives. All these casual mechanisms and links are interconnected and interdependent, existing together to make a significant impact on changes produced by the project/programme.

It seems that the process tracing approach is a suitable method for analysing the casual mechanism and links which determine link between intervention, the conditions of its implementation and its outcomes. The above presented process implementation evaluation has got qualitative character because it makes possible to understand the specific conditions of the intervention implementation based on one selected case study.

5.2 Methodology

5.2.1 Process tracing method implementation

The process implementation evaluation was conducted based on the process tracing approach. It is single case research method which can be used to make within-case inferences about presence or absence of casual mechanisms (George, Bennett 2005:224). This method makes possible the tracing of casual mechanisms in a selected case study (Bennet, 2008).

The methodology of research based on process tracing assumes the development of plausible casual mechanisms that can explain why ASOS Programme intervention (X) contribute to produce the defined outcomes in the “Aktywni bez względu na wiek” project (Y). In the scientific literature three variants of process tracing method have been distinguished:

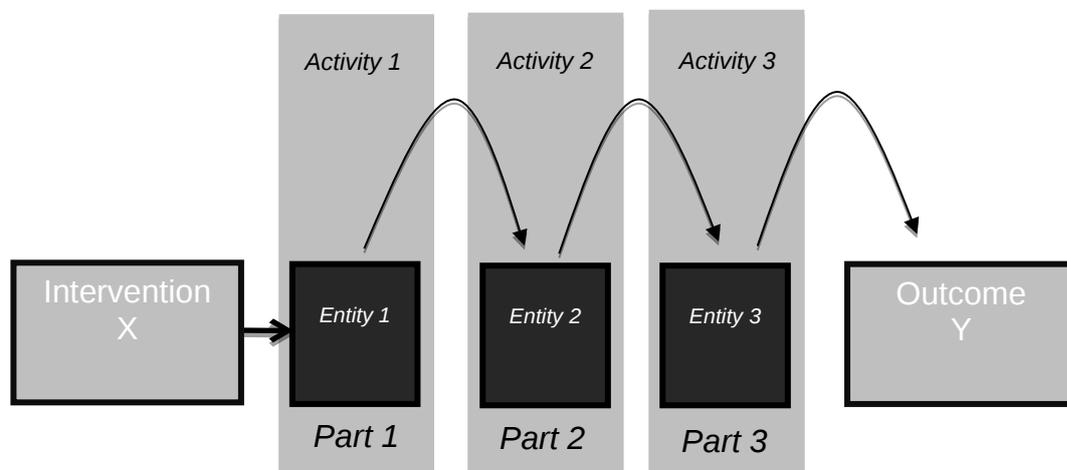
- theory- testing
- theory building
- explaining outcome (Beach, Pedersen, 2013)

In our research the variant of theory of change testing have been implemented. Theory- testing process tracing can be used when:

1. X and Y are known
2. A causal link between X and Y exists
3. A researcher thinks he knows why X led to Y (for example the theory of change exists and explains why intervention X should led to outcome Y (Puton, Welle, 2015:2).

Theory-testing process tracing deduces a theory from the existing scientific sources and then tests whether there is any evidences that hypothesized causal mechanisms really exist in a given case.

Figure 5.1. A casual mechanism in process tracing method.



Source: Puton, Welle, 2015: 3.

The primary and secondary data collected by the research team proved that the correlation between the ASOS Programme intervention X and the intended outcomes of the “Aktywni bez względu na wiek” project Y existed. The evidence for existence of casual mechanisms linking X and Y should be examined. Finding the certain evidence for existence the casual mechanism between X and Y means that theory of change is positively verified. Studying casual mechanisms is based on the development of strong empirical tests which verify whether the collected evidence proves or denies that the casual mechanism between X and X exists. The empirical testing of evidence in the process tracing is logic, which means that the casual mechanism between X and Y should leave the predicted empirical manifestations, which can be observed in the empirical material (Bennet, Checkel, 2012).

The process tracing method of analysis assumes development of empirical predictions which should by verified by different types of tests. Four types of tests confirm or invalidate formulated hypotheses about existence of casual mechanism:

- Straw-in-the-wind tests: empirical prediction that has a low level of uniqueness and a low level of certainty. This test has low level of confirmatory and disconfirmatory power
- Hoop tests: empirical prediction that has a low level of uniqueness and a high level of certainty. This test has low confirmatory and high disconfirmatory power
- Smoking gun tests: empirical prediction that has a high level of uniqueness and a low level of certainty. This test has low confirmatory and high disconfirmatory power
- Doubly decisive tests: empirical prediction that has a high level of uniqueness and a high level of certainty. This test has high confirmatory and disconfirmatory power (Collier, 2012).

In summary:

“These tests are based on the principles of certainty and uniqueness; in other words, whether the tests are *necessary* and/or *sufficient* for inferring

the evidence. Uniqueness and certainty exist along two dimensions – which can be presented on a matrix” (Puton, Welle, 2015: 6).

Table 5.2. Matrix for assessing the certainty and uniqueness of evidence

		Certainty of evidence	
		Low	High
Uniqueness of evidence	Low	Straw -in- the- wind tests	Hoop tests (evidence is insufficient for H)
	High	Smoking gun tests (evidence is not necessary for H)	Doubly decisive tests (evidence is sufficient for H) (evidence is necessary for H)

Source: Puton, Welle, 2015: 6

Testing the casual relationship between ASOS Programme intervention and outcomes of the “Aktywni bez względu na wiek” project will make possible verification of the existing theory of change of the ASOS programme and find what is in the “black box”.

Using the process tracing approach also has several limitations. The scope of a single case study which is investigated and the limited possibility of making more general conclusions from the research is one of the limitations. Although, still this method is usefull in explaining how the program works at local level by analysing the local conditions of its implementations.

The process implementation evaluation of the “Aktywni bez względu na wiek” project involves both qualitative and quantitative methods of data

collection. However, this evaluation is based on case study n=1 so, qualitative methods are the main sources of data gathering.

5.2.2 Quantitative methods

The University of Wrocław research team did the analysis of quantitative data collected in the process of the project “Aktywni bez względu na wiek” evaluation. This data was collected by project management after finishing the second edition of the “Aktywni bez względu na wiek” project. This quantitative data do not capture most aspects of project implementation so its utility in the context of the research aims is limited. However, the collected data are estimated as reliable. All beneficiaries of the ASOS Programme were investigated by the evaluation and its results were clearly described and analysed. The data was not systematically collected and the University of Wrocław team did not participate in monitoring and collecting this quantitative data. For that reason, using quantitative secondary data in the process implementation evaluation was limited and we could not rely on it. As the result, qualitative methods of primary data collection were developed.

5.2.3 Qualitative methods

The primary qualitative data collected by the research team have been used to test the hypotheses about casual mechanism and links between ASOS Programme intervention and the outputs produced as the results of this intervention. The following qualitative methods of data collection were used:

- Analysis the project documentation: final report from the project implementation
- Semi-structured individual interviews with the seniors as the main beneficiaries of the project- 6 interviews
- Semi-structured individual interviews with service deliverers in the project- 4 interviews
- Semi-structured individual interview with project coordinator- 1 interview

- Focus interview (group) with seniors as the main beneficiaries of the project – the focus group contained 5 participants

5.3 Results

At the first stage of research the correlation between the ASOSO program intervention (X) and the outputs of the “Aktywni bez względu na wiek” project (Y) was positively verified by differentiated types of evidence collected and verified by the research team. The list of verified intended outcomes of the “Aktywni bez względu na wiek” project with the sources of their verification contains the table 5.2.

Table 5.2. List of verified intended outcomes of the “Aktywni bez względu na wiek” project with the sources of verification

Intended outcomes	Source of verification
New social contacts of beneficiaries	<ul style="list-style-type: none"> • Semi-structured interviews with beneficiaries of project • Focus interview (group) with seniors
Involvement of beneficiaries in voluntary activities	<ul style="list-style-type: none"> • Final report from the project implementation • Semi-structured individual interviews with seniors • Semi-structured individual interviews with project coordinator
New language skills of beneficiaries	<ul style="list-style-type: none"> • Final report from the project implementation • Evaluation report made by Towarzystwo Edukacyjne Wiedza Powszechna • Semi-structured individual interviews with seniors • Focus interview (group) with seniors • Semi-structured individual interviews with service deliverers • Semi-structured individual interviews with seniors’ families members
New computer skills of beneficiaries	<ul style="list-style-type: none"> • Final report from the project implementation • Evaluation report made by Towarzystwo Edukacyjne Wiedza Powszechna • Semi-structured individual interviews with seniors • Focus interview (group) with seniors

	<ul style="list-style-type: none"> • Semi-structured individual interviews with service deliverers • Semi-structured individual interviews with seniors' families members
New manual and artistic skills of beneficiaries	<ul style="list-style-type: none"> • Final report from the project implementation • Semi-structured individual interviews with seniors • Semi-structured individual interviews with service deliverers
Better mental wellbeing of beneficiaries	<ul style="list-style-type: none"> • Semi-structured individual interviews with seniors • Focus interview (group) with seniors • Semi-structured individual interviews with service deliverers • Semi-structured individual interviews with seniors' families members
Better physical wellbeing of beneficiaries	<ul style="list-style-type: none"> • Semi-structured individual interviews with seniors • Focus interview (group) with seniors • Semi-structured individual interviews with service deliverers • Semi-structured individual interviews with seniors' families members
New educational services for elderly people offered by the „Towarzystwo Edukacyjne Wiedza Powszechna”	<ul style="list-style-type: none"> • Final report from the project implementation • Semi-structured individual interviews with service deliverers • Semi-structured individual interviews with project coordinator

Source: own research and project documentation analysis.

The second stage of the process implementation evaluation contained the formulation of the hypotheses about the existing casual mechanisms which link the intervention with the intended outcomes produced in the project and have significant influence on the process implementation of the “Aktywni bez względu na wiek” project. The following hypothetic empirical predictions were formulated by research team:

1. The ASOS Programme intervention resulted in establishment new social contacts by beneficiaries because:

H.1.1. Thanks to the participation in the project, the beneficiaries met new interesting people

H.1.2. The new people, who were met by seniors, during the project, shared the same interests and problems with them.

H.1.3. The psychologist, who delivered psychological support, persuaded the seniors to establish new social contacts in order to reduce feeling of social alienation

2. The ASOS Programme intervention resulted in the involvement of beneficiaries in voluntary activities because:

H.2.1. Through participation in the project, the beneficiaries realised that they could help other people

H.2.2. The seniors received the offers of taking up voluntary activities in the local social organisations

3. The ASOS Programme intervention resulted in the development of new language skills of beneficiaries because:

H.3.1. Beneficiaries were strongly motivated to learn English due to the fact they would like to communicate in a foreign language with the family who live abroad

H.3.2. The programme of the course was adjusted to the seniors' intellectual abilities and educational needs

H.3.3. The innovative formula of the language course made possible learning more effective and efficient than learning in traditional way

4. The ASOS Programme intervention resulted in the development of new computer skills of beneficiaries because:

H.4.1. The beneficiaries were strongly motivated to learn using the computer in order to communicate with the families who live abroad by skype

H.4.2. The programme of the computer course was adjusted to the seniors' intellectual abilities and educational needs

5. The ASOS Programme intervention resulted in the development of new manual and artistic skills of beneficiaries because:

H.5.1. The beneficiaries wanted to develop their previous existing interests and hobbies

H.5.2. The seniors were keen on developing the practical skills which next could be used by them in everyday life

6. The ASOS programme intervention resulted in the improvement mental wellbeing of beneficiaries because:

H.6.1. The seniors received individual psychological support which helped them to deal with their personal problems

H.6.2. The seniors started to be socially active and feel stronger identity with their local community

7. The ASOS programme intervention resulted in the improvement physical wellbeing of beneficiaries because:

H.7.1. Seniors were keen on being healthier and participated in the physical training systematically

H.7.2. The programme of the training was adjusted to the individual physical abilities of participants

8. The ASOS programme intervention resulted in new educational services for elderly people development offered by the „Towarzystwo Edukacyjne Wiedza Powszechna” because:

H.8.1. The TEWP was interested in the implementation its main objective which refers to the support of different social groups to adjust them to the challenges of global world

H.8.2. The TEWP effectively cooperated with the private sector actors in elaboration and implementation the new educational offer

H.8.3. The TEWP had an access to the resources coming from public and

5.3.1 Hypotheses testing

At the third stage of the process implementation of the project evaluation these hypothetic empirical predictions were verified by testing and categorised as confirmed or disconfirmed. The process of testing the hypotheses was based on the analysis of empirical evidence. The weight of all evidence was assessed and then the research team selected these which were positively verified.

H.1.1. Thanks to the participation in the project, the beneficiaries met new interesting people.

Evidence constituting hoop test: During the focus group the seniors claimed that they established new social contacts with people because the project was a good opportunity for them to meet new people and have new friendships. On the other hand they did not mention why these new people attracted their attention. This piece of evidence constitutes a hoop test because the result of focus interview is certain but not unique. The evidence does not provide reasonable confidence in the hypothesis.

H.1.2. The new people, who were met by seniors, during the project, shared the same interests and problems with them.

Evidence constituting double decisive test: In the individual semi-structured interviews all seniors mentioned that participating in the project resulted in them meeting people who shared the same life experiences and problems. Similar social and individual situations of seniors affected by health problems and loneliness was the basis for new friendship development. This piece of evidence constitutes a double decisive test because the seniors opinions seems to be certain and unique. The decisions about establishing new social contacts were independent and based on the personal preferences expressed by beneficiaries. The evidence provides high level of confidence in the hypothesis.

H.1.3. The psychologist, who delivered psychological support, persuaded the seniors to establishment the new social contacts in order to reduce feeling of social alienation

Evidence constituting a straw-in-the-wind test: In the individual semi-structured interview the psychologist who delivered individual psychological support for the beneficiaries of the “Aktywni bez względu na wiek” project did not speak about the detailed methods and techniques used in order to solve beneficiaries’ life problems. Moreover, the psychologist did not enumerate the social alienation as a serious problem that affected the seniors participating in the project. The existing evidence is neither unique nor certain.

H.2.1. Through participation in the project, the beneficiaries realised that they could help other people.

Evidence constituting a double decisive test: In the individual semi-structured interviews the seniors told the interviewer that thanks to participation in the social activation workshop they could realise that they had to be more social active and were able to help other people affected by more serious social problems than their own. Beneficiaries mentioned that they were especially interested in helping other seniors and children from trouble families. They realised that the voluntary activities are as important as financial support and they have other resources like knowledge, free time, life experience and patience that could be given to other people. The existing evidence is unique and highly certain and confirms the hypothesis.

H.2.2. The seniors received the offers of taking up voluntary activities in the local social organisations

Evidence constituting a double decisive test: The final report from project implementation mentions that after finishing the activation workshop the beneficiaries received the concrete offers of voluntary work. Some of them took up the activities in different social organisations and several in the TEWP. This evidence is unique and highly certain and highly confirms the hypothesis. This hypothesis is also supported by another supplement evidence: the results of the individual semi-structured interviews with beneficiaries. They acknowledged that the project coordinator, who also invited them to cooperation with the TEWP, presented the voluntary

activities offers. Both existing evidences are unique and highly certain and highly confirms the hypothesis.

H.3.1. Beneficiaries were strongly motivated to learn English due to the fact they would like to communicate in foreign language with the family who lives abroad

Evidence constituting a double decisive test: In the individual semi-structured interviews the seniors said that they were interested in learning English in order to have better communication with families living in United Kingdom. The beneficiaries who participated in the focus interview expressed the same opinions. Almost every interviewed person had some relatives in UK. It was especially important for two of them, who had daughters-in-law who were not of Polish origin. The existing evidence is unique, certain and highly confirms the hypothesis.

H.3.2. The programme of the English course was adjusted to the seniors' intellectual abilities and educational needs

Evidence constructing smoking gun test: in the semi-structured individual interview the English language teacher claimed that the program of the English course was especially adjusted to the intellectual abilities and educational needs of elderly people. For the teacher it was a kind of professional challenge, because there was the first course in which she taught seniors as the precisely defined age group. The seniors were working mostly during the classes and the course was oriented on the development the oral skills. The existing evidence is highly unique but not certain so it not confirms the hypothesis in enough extent.

Evidence constituting a double decisive test: In the individual semi-structured interviews the seniors claimed that the English course met their needs and the organisation of teaching process took into account their limitations which refer to their age. The seniors evaluated positively the English classes and teacher's engagement in delivering the course. They developed their language skills during nordic walking classes, speaking to each other and with the trainer in English. The existing evidence is highly unique and certain so it confirms the hypothesis.

H.3.3. Innovative formula of the language course made possible learning more effective and efficient than learning in traditional way

Evidence constituting straw-in-the-wind-test: None of the project stakeholders estimated the language course as innovative. Although the seniors claimed that the English teacher used some methods which were estimated as supportive in the process of learning like for example: watching films or role play they did not name them as innovative. The existing evidence is neither unique nor certain and does not have any significance for both confirmation and rejection the hypothesis.

H.4.1. The beneficiaries were strongly motivated to learn using the computer in order to communicate with the families who live abroad by skype

Evidence constituting a double decisive test: In the semi-structured interviews the beneficiaries claimed that they were motivated to learn new computer skills by the fact that most of them liked to use the internet and skype in communication with members of their families live abroad. The beneficiaries who participated in the focus interview expressed the same opinions. The existing evidence is unique and certain so it conclusively confirms the hypothesis.

H.4.2. The programme of the computer course was adjusted to the seniors' intellectual abilities and educational needs

Evidence constituting a double decisive test: In the semi-structured interviews the beneficiaries claimed that the programme of the computer course was adjusted to their abilities of understanding how new technologies work. The teacher was patient and explained difficult issues very slowly and clearly. There were a lot of practical exercises, which were supportive in learning process. The beneficiaries estimated the computer course as very useful in learning practical skills needed in every-day life like for example: having internet access to the bank. The existing evidence is unique and certain so it conclusively confirms the hypothesis.

H.5.1. The beneficiaries would like to developed their previous existing interests and hobbies

Evidence constituting a double decisive test: In the focus interview the senior expressed the opinion that manual and artistic classes had special significance for them. So that they could have a contact with art and hand-made craft. It was the special field of their interest and they could improve their previous artistic skills. The existing evidence is unique and certain so it highly confirms the hypothesis.

H.5.2. The seniors were keen on developing the practical skills, which next could be used by them in everyday life

Evidence constituting a smoking gun test: Only one beneficiary in the individual semi-structured interview reported that manual and artistic classes had a very practical significance for her. She declared that she was thinking about making and selling folk jewellery as an additional source of income and participating in the classes improved her opportunities for implementation that idea. The existing evidence is unique but not certain enough to confirm the hypothesis.

H.6.1. The seniors received individual psychological support, which helped them to deal with their personal problems

Evidence constituting a double decisive test: In the individual semi-structured interview the psychologist stated that the main aim of individual psychological support offered in the project was oriented on helping the seniors in dealing with difficult situations in everyday life. In the psychologist opinion the psychological support helped them to solve family conflicts and have better relationships with children or spouses. Finally it had a positive influence on their mental stabilisation. The existing evidence is unique and sufficiently certain to confirm the hypothesis.

H.6.2. The seniors started to be socially active and feel stronger identity with local community

Evidence constituting a straw-in-the-wind-test: Although the beneficiaries mentioned that because of project participation they were more active and they developed new social contacts but they did not notice the correlation between these social changes and improved mental wellbeing. In the semi-structured individual interviews they spoke willingly about their engagement in local issues and better integration with the local

community, while the issue of mental wellbeing was almost excluded as a topic of consideration. The existing evidence is neither unique nor certain to confirm the hypothesis.

H.7.1. Seniors were keen on being healthier and participated in the physical training systematically

Evidence constituting a double decisive test: In the semi-structured individual as well as focus interviews the seniors emphasised that from the beginning of their participation in the project they had very strong motivation to feel better and be healthier by doing physical exercises offered in the project. Therefore, they participated in the physical training regularly and did the exercises with great engagement. The physical training coach who noticed the seniors were very motivated and did all exercises at the highest level of involvement also verified this hypothesis. The existing evidences are unique and highly certain to confirm the hypothesis.

H.7.2. The programme of the training was adjusted to the individual physical abilities of participants

Evidences constituting a double decisive test: In the semi-structured individual as well as focus interviews the seniors stated the physical exercises and sport services were adjusted to their physical abilities. They emphasised the crucial role the trainer played in the training programme preparation. He was judged to be a very well prepared specialist who was familiar with the problems of elderly people. The beneficiaries appreciated not only the fact that the training programme consulted with them and took into account their physical abilities, but also the personal engagement of the coach in delivering high quality training for them. This hypothesis was also verified by another evidence which was the semi-structured individual interview with the coach. He told that the offer of physical exercises for seniors was prepared based on his professional knowledge in the area of kinesigeronotherapy. He also claimed that one of the most important parts of the training was the atmosphere of relaxation and inclusion during the classes. The existing evidence is unique and highly certain to confirm the hypothesis.

H.8.1. The TEWP was interested in the implementation its main objective which refers to the support of different social groups to adjust them to the challenges of global world

Evidences constituting hoop test: In the final report from the “Aktywni bez względu na wiek” project implementation the TEWP defined the main aims of the project. The report states that educational services were delivered to the seniors in order to support them in efficient functioning in the current world. This evidence is certain but not enough unique to confirm the hypothesis.

H.8.2. The TEWP effectively cooperated with the private sector actors in elaboration and implementation the new educational offer

Evidences constituting a double decisive tests: In the semi-structured individual interview the project coordinator told that the TEWP engaged the specialists from the thematic areas like: English, computer science, physical education, psychology, law and others to the elaboration and implementation the educational services for project beneficiaries. This hypothesis is also confirmed by other evidence like the semi-structured interviews with service deliverers and final report from the project implementation. The report contains the information about the number and scope of contracts signed with private actors for educational service delivering. Sixteen contracts were signed in order to deliver new educational services for beneficiaries. This evidence is certain and unique and confirms the hypothesis.

H.8.3. The TEWP had an access to the resources coming from public and social sector, necessary for effective project implementation

Evidence constituting a double decisive tests: In the final report from the “Aktywni bez względu na wiek” project implementation is the information about amount of financial support received from the Ministry of Family, labour and Social Policy of Polish government. In the semi-structured interview the project coordinator told that in case of lack the financial support, the project had not been implemented at all. The above mentioned report enumerates the following institutions which participated in the project preparation: Miejski Ośrodek Pomocy Społecznej as the

public institution specialised in the support for people threatened by social exclusion, Związek Emerytów i Rencistów as the social organisation which supports seniors and disable people and Uniwersytet Trzeciego Wieku as the social organisation established by University of Gdańsk in order to educational services delivering for seniors. MOPS and Uniwersytet Trzeciego Wieku delivered information about the needs and problem of the seniors from Gdańsk and Związek Emerytów i Rencistów and local Catholic Church organisations participated in the process of the beneficiaries' recruitment to the project. These evidences are highly certain and unique and confirm the hypothesis.

5.3.2 Identified casual mechanisms in the project

The fourth stage of the process evaluation implementation was to identify the positively verified casual mechanisms which link the intervention of the ASOS Programme with the outcomes produced in the project. The following casual mechanisms were indentified:

1. The project beneficiaries established new social contacts because by participating in the project they met people who shared their interests and problems. It means that social integration between seniors were stronger if they were similar from the sociological perspective.
2. The seniors took up the voluntary activities because by participating in the project, they realised that they could help other people and they received the concrete offer from social organisations which were interested in having seniors as the volunteers.
3. The seniors improved their language, computer and manual skills by participating in the courses and trainings offered in the project because the educational offer was adjusted to the seniors' intellectual abilities and educational needs
4. The improvement of mental wellbeing of the beneficiaries participated in the project was possible because they received individual psychological support which helped them to deal with their personal problems
5. The improvement of physical wellbeing of the beneficiaries

participated in the project was possible because they seniors were keen on being healthier and the physical training offered in the project was adjusted to the seniors individual physical abilities

6. The TEWP developed the new educational services in the project by effective cooperation with private actors as the service deliverers and using the resources of several public and social institutions which determine the effective implementation of the project

5.3.3 Conclusions

The theory of change of the ASOS Programme was positively verified by using the process tracing method in order to find the casual mechanisms linking the ASOS Programme intervention with the outcomes produced in the “Aktywni bez względu na wiek” project. In case of this project, the main casual mechanisms were connected with beneficiaries and their motivations for participating in the classes and learning new skills, the quality of educational services and the level of their adjustment to the beneficiaries’ needs and expectation and the arrangements between actors participating in the project planning and implementation. They had significant influence on the fact how the project was implemented and for the reaching of its goals.

The casual mechanisms were tested and verified by different types of tests, which confirmed their existence. The use of the process tracing method opened up the “black box” with the casual mechanism, which were inside (Putton, Welle, 2015: 3) and allowed the establishment of the lists of contextual factors, which determined the effective implementation of the “Aktywni bez względu na wiek” project. The main ones were:

- Strong individual motivations of the beneficiaries participating in the projects for using the opportunities and chances offered by the project in order to improve their quality of life and wellbeing
- The correct identification the needs and expectations of the project beneficiaries and the preparation of educational services which were the proper responses for seniors’ requirements
- The cooperation between the social actor TEWP responsible for project implementation and services deliverers who represent

private sector sensitive and flexible for seniors' needs which can be commercialised and met by market

- Using enhanced cooperation with public institutions and other social actors in order to acquire different types of resources important for correct project implementation

Making generalisations about the determinants of the effective implementation the whole ASOS Programme, based on one case study example, seems to be not only invalid but also needles. The results of process implementation evaluation show that the ASOS Programme implementation has strong local dimension and every time depends where the project is implemented, who is responsible for its goals achievement, what are the arrangements between the actors engaged in the project implementation. Based on the research observations and experiences collected by the research team during the evaluation of process implementation the project, we recommend doing comparative research of projects, which have been financed by the ASOS Programme. The analysis of the number of case studies $n > 1$ and comparing their results would be possible to make more general conclusions about casual mechanisms located in "black box", which determine the process implementation of the ASOS Programme and finally the level of goals achievement. It is worth to emphasise that the two types of projects, both these which have reached the goals and these which have finished without success, should be evaluated. The obtained results ought to be compared in order to make generalisations about the ASOS Programme conditions of implementation. Due to the limited time, financial and organisational resources the University of Wrocław research team was not able to take up comparative research based on $n > 1$ case studies.

6. Impact evaluation

6.1 Introduction

The aim of the impact evaluation of the “Aktywni bez względu na wiek” project is to identify if the intervention of ASOS Programme made any changes in the personal and social situation of elderly people who were the beneficiaries of this intervention. This impact evaluation has been also implemented in order to find the answer for the question which stakeholders of the project and in what extents were affected by the ASOS Programme. The examination contained the analysis of social and psychological impact of the ASOS Programme on individuals, community and institutions engaged in the “Aktywni bez względu na wiek” project. As the result of the conducted research the main outcomes of the intervention were identified which appeared as the result of the programme “Aktywni bez względu na wiek” implementation. These analyses were made in order to examine if the “Aktywni bez względu na

wiek” project achieved its stated objectives. It was a key question for the InnoSi project.

The overall impact evaluation of the whole ASOS Programme has not been undertaken so far. The University of Wroclaw research team was not able to evaluate the entire ASOS Programme for organisational and economic reasons, so one project was selected as the case study for evaluation. Although the Towarzystwo Edukacyjne Wiedza Powszechna responsible for its implementation evaluated the “Aktywni bez względu na wiek” project, the existing findings from this evaluation have got limited character and refer only to the seniors as the main beneficiaries of the ASOS Programme. Moreover, this evaluation focused on the selected social changes generated by the project and did not consider whether and what kind of psychological changes appeared as the result of project implementation.

Based on existing limitations of knowledge about different types of changes and outcomes caused by the project and about stakeholders which were affected by the intervention, the University of Wroclaw research team decided to take up research, which helped to answer questions about the scope and the nature of outcomes which appeared as the result of intervention and the connections between outputs and outcomes. In the impact evaluation we analysed both social and psychological impact on all types of project’s stakeholders (beneficiaries, families of beneficiaries, service deliverers, organisation responsible for project implementation and local community). The special interest was the issue of whether the “Aktywni bez względu na wiek” project supported local public sphere development.

This impact was measured by the system of indicators, which had been developed in order to show the outcomes appeared as the results of intervention. The indicators reflect the changes connected with the project implementation. Some of them have got quantitative character but the outcomes, which are not measurable, also appeared.

Making impact evaluation would enable the verification existing theory of change of ASOS programme.

6.2 Impact evaluation methodology

This impact evaluation methodology is based on case-study approach. The “Aktywni bez względu na wiek” project is one among many projects supported by the ASOS Programme in 2015, so the context of its implementation is significant for the qualitative research of intervention. In order to verify the impact of the project on the different groups of its stakeholders, the following hypotheses were formulated:

1. The beneficiaries experienced positive changes of their personal and social situation as the result of the participation in the project “Aktywni bez względu na wiek”
2. Positive changes appeared progressively in line with the collection of new knowledge, learning new skills and development new social contacts by the beneficiaries of the project
3. The participation of seniors in the “Aktywni bez względu na wiek” project caused positive changes in their life, which appeared as the intended and unintended outcomes of the project.
4. Beneficiaries’ participation in the project improved their quality of life from their personal perspective
5. The implementation of the “Aktywni bez względu na wiek” project made greater interest the problems of elderly people among their families and local community
6. The implementation of the “Aktywni bez względu na wiek” project had positive impact on the local silver economy contains services for elderly people development
7. The participation of seniors in the “Aktywni bez względu na wiek” project will have the positive influence on the social activation of this group and its better integration with the local community even in the future
8. The increase of interest in delivering educational services for elderly people by the private actors is forecasted

In the impact evaluation of the “Aktywni bez względu na wiek” project the case-based approach was implemented. In this approach the

intervention (project) is considered as a complex system of interacting causes which result in the concrete outcomes. The quantitative data from previous evaluation collected by the organisation, which implemented the project, was used but qualitative methods of data collection dominated. The contextual qualitative methods in this impact evaluation were used as the examined project was the example for the local case study intervention oriented on the specific needs of selected age group: seniors. Using open-ended questions in the semi-structured interviews with project stakeholders allowed for complex analyses non-quantifiable changes which appeared as the results of the project implementation. The following qualitative methods in the research process were used:

- Analysis of the project documentation: the application form for funding with the project description, evaluation report made by Towarzystwo Edukacyjne Wiedza Powszechna, final report from the project implementation
- Semi-structured individual interviews with the seniors as the main beneficiaries of the project- 6 interviews
- Semi-structured individual interviews with service deliverers in the project- 4 interviews
- Semi-structured individual interviews with seniors' families members- 2 interviews
- Semi-structured individual interviews with project coordinator- 1 interview
- Focus interview (group) with seniors as the main beneficiaries of the project - the focus group contained 5 participants

The evaluation focuses on analysis of the different types outcomes, which appeared as the result of project implementation:

- intended (assumed and planned)
- unintended (unexpected)
- positive
- negative

- psychological
- social
- primary (directly in line with the project's aims)
- secondary (added)

The analysis concentrates not only on intended changes, which were assumed and expected as the project's outcomes. It also refers to unintended, positive and negative changes. Logically, the programme/project creators do not assume the negative changes but they can appear as the unintended results of intervention. It is relevant to identify not only the social but also the psychological impact.

The research was extended to the changes refer to main project's stakeholders: seniors as the main beneficiaries, service deliverers, beneficiaries' families and organisation, which implemented the project. The University of Wrocław research team developed the list of indicators, which reflect the produced outcomes. Part of them refers to the outcomes and outputs assumed by the project planners. The analysis of these indicators gives the answer for the question if the intended changes appeared in the result of project implementation.

6.2.1 The strengths of used methodology

This research had got contextual character, which made possible to analyse different factors determined the change. It was especially important in defining the psychological changes, which appeared as the result of project implementation. Semi -structured interviews of the project's stakeholders made possible to understanding the mechanism, which generated the changes.

6.2.2 The weaknesses of used methodology

The methodology used was based mostly on qualitative methods thus eliminating the possibility of having and interpreting large- scale data. The number of interviewed people in every group of project' stakeholders was not representative for whole group but it was determined by two objective factors. The first was the limited access to the whole group of beneficiaries of the projects and the second one the

limited financial, time and human resources available for research team. Nevertheless these existed limitations did not affect the final findings and results of impact evaluation.

One of the aims of the University of Wroclaw research team in the impact evaluation process was to establish the list of indicators, which reflect the outcomes, appeared as the results of intervention. The proposed list has got limited character in comparison with the list of outcomes produced in the project and revealed by the research team. This difference is the consequence that part of these outcomes is difficult to measure by the qualitative indicators. Therefore, we assumed that part of them can be measured only by the qualitative analysis of people' opinions.

6.3 Results

The results of impact evaluation show that the intervention was significant mostly for seniors as the main beneficiaries of the projects. The designed and produced outputs in the “Aktywni bez względu na wiek” project refer to the new educational offer, new forms of support for elderly people which finally caused the psychological and social changes in their life. Seniors as the targeted group of the project experienced different types of changes, produced by the intervention. Other stakeholders were also affected by the influence of the project, but to a lesser degree. The intervention resulted not only in intended changes but also in unintended as well and what is worth emphasising that the intervention did not cause any negative changes.

Table 6.1. The comparison of outputs designed in the “Active regardless the age” project with outputs produced in the projects.

List of outputs in the “Aktywni bez względu na wiek” project			Fidelity in [%]
Name	Designed	Produced	
The number of beneficiaries participated in the language course	60	60	100
The number of beneficiaries	60	60	100

participated in the computer course			
The number of beneficiaries participated in the manual and artistic workshops	60	60	100
The number of beneficiaries participated in the psychological workshops	60	60	100
The number of beneficiaries supported by the individual psychological assistance	60	60	100
The number of beneficiaries participated in law education workshop	60	60	100
The number of beneficiaries participated in the physical training	60	60	100
The number of beneficiaries participated in the social activation training	60	60	100
The number of teaching hours of language course per one beneficiary	50	50	100
The number of teaching hours of computer course per one beneficiary	32	32	100
The number of teaching hours of manual and artistic workshop per beneficiary	42	42	100
The number of teaching hours of	6	6	100

psychological workshop per beneficiary			
The number of hours of individual psychological support per beneficiary	1	1	100
The number of teaching hours of law education workshop per beneficiary	6	6	100
The number of teaching hours of physical training per beneficiary	64	64	100
The number of teaching hours of social activation training per beneficiary	6	6	100

Source: *Oferta organizacji pozarządowej...*, 2015: 10,11 and Towarzystwo Edukacyjne Wiedza Powszechna, 2016: 1-4.

The high level of the fidelity of the outputs could have been achieved because of the high degree of the intererets in the project among the elderly people in Gdańsk. As the coordinator of the project reported, there was a small level of dropp off at the beginning of the project. Some of the beneficiaries decided not to attend the tranings and the workshops after first several meetings. There was a reserve list of seniors who were interested in participating in the project although they had not be selected in the first recruitment process and they were included in the project after the people who dropped out at the project at the beginning. The TEWP as the organisation responsible for project implementation put the special attention on the engagement of the beneficiaries in the project because it was a main condition of having the full funding of the project from the ASOS Programme.

The main aim of the “Aktywni bez względu na wiek” project designed as “the social activation of elderly people over 60 in a difficult

situation, sometimes affected by a slight disability or risk of exclusion, enabling them through comprehensive educational offer to acquire new knowledge and skills to function more efficiently in a changing world and maintain good physical, mental and intellectual condition” was achieved. The aim of the project was in line with the main objective of the ASOS Programme defined as the: „Improvement the quality and the standard of living the elderly people for the dignified ageing through social activity”. The impact of the intervention on the reaching the programme and project aims was verifying by the list of outcomes produced in the project. The list of outputs presented in the table 6.1. refers to different groups of the project’s stakeholders. The most important group was the elderly people as the beneficiaries of the project „Aktywni bez względu na wiek”.

The results of the individual interviews show that the seniors started to go out to public sphere more often thanks to the participation in the project, where they met new people, interacted with them and had new social contacts and relations. This physical coming out in the public sphere of elderly people was the beginning for wider engagement in the local community life. The public sphere started to be perceived by seniors as the place where they were not desolated and could meet people who were at the same age, had similar style of thinking and living, shared the same problems. This change was intended and anticipated as the result of the project and having new social contacts finally helped seniors in their engagement in the voluntary activities. In two cases they encouraged the seniors who met new friends to the voluntary work. After the finishing of the project not every beneficiary participated in the voluntary activities. Five interviewed project beneficiaries declared that they were involved in different voluntary actions at the local level. This activity referred to the support in the community day care centres, for children from families affected by social problems, engagement in the support for other elderly people who live in the nursing houses in Gdańsk and the participation in organising local festivals and events. The project coordinator mentioned that a few beneficiaries did voluntary work for the Towarzystwo Edukacyjne Wiedza Powszechna. One person was the volunteer in the

scientific research project delivered by the researchers from University of Gdańsk. It is worth mentioning that elderly people who were not active as the volunteers after the project finishing, they declared of taking up voluntary activities in the near future. The engagement of elderly people in the voluntary activity was one of the main intended outcome, designed in the project at the stage of its mapping out. It was important for beneficiaries from two perspectives: psychological and social one. They not only felt better integrated with the local community and found new place in the local public space but also changed their mind about their role in the society. All of them started to feel as useful, badly needed and important members of the local community. Two interviewed people reported that the new voluntary duties mobilised them to the better organisation of their personal everyday life.

The second group of outcomes, which were produced in the project, refer to the new skills learnt by seniors. These outcomes were intended and reached by organising regular classes and workshops for beneficiaries. Learning new computer and language skills was considered by elderly people as the chance for better functioning in everyday life. They were interested in having contacts with families have lived abroad by skype, speaking with grandchildren in English and using new computer technologies in every-day life, for example in the contacts with banks and public institutions. These new skills caused another extra unintended but positive change in their life. They started to feel more self-confident and independent from people who formerly helped them with using new technologies, as family members or acquaintances. They started to use the computers, internet and mobile phones to deal with the everyday issues, like for example: paying bills via Internet, ordering cultural and recreational services or checking information. They felt that can rely on themselves in more extent than before they learning new skills by participation in the courses. The English language skills were especially important for three beneficiaries who have got families living in the United Kingdom. Through learning English they could communicate directly with their daughters-in-law (two cases) who were not Polish of origin. Moreover,

the three beneficiaries used the new skills during travelling abroad. Participating in the manual and artistic workshop enabled them to develop personal interests and hobbies and spending time together with people who shared the same interests. One person made declaration that she was thinking about making and selling folk jewellery as the way for having added source of income.

Participating in the psychological workshop and individual meeting with therapist had a positive impact on mental wellbeing of beneficiaries. This outcome was intended and it was produced by the psychological support which helped elderly people cope with difficult life situations, like for example: loneliness, disability, diseases in family or financial problems. The legal consultations supplemented the psychological assistance and had positive influence on finding solutions some difficult situations, which were faced by elderly people. After the psychological and legal workshops the individual and subjective sense of safety among elderly people have increased and they started to perceive their life as more stable and predictable.

The next positive outcome, which was produced by the intervention, was better physical wellbeing of beneficiaries. Elderly people participated in the “Aktywni bez względu na wiek” project took part in the physical training delivered by the specialist in the area of kinesigerontotherapy. The plan of training was adjusted to the needs and physical conditions of elderly people. The couch used different methods of training, inter alia, Nordic walking and gymnastics, which improved beneficiaries’ physical strength, flexibility, agility, coordination, and balance. Finally all beneficiaries participating in the semi-structured individual interviews and in the focus interview expressed the strong opinions that they felt much better as the result of doing physical exercises. So these training had positive impact on their subjective feeling of physical wellbeing. Some of them claimed that they reduced the amount of ingested painkillers and the frequency of visits in general practitioner's office.

The next unintended change generated by the project relating to the elderly participants was transformation of their style of living. Although the

project and all courses, trainings and workshops had been finished on 31st of December 2015, the beneficiaries declared that they met each other and with the kinesigerontotherapy coach once a week and they still did physical exercises. It means that the change of their style of living is long-term and permanent. The beneficiaries reported that before the project participation they spent more time at home, watching TV, cleaning or looking after the grandchildren. They were physically and socially passive and felt as excluded from public sphere and social life. Half of the year after finishing of the project they remained active and keen on doing physical training and meeting new friends. This change in the style of living of the seniors participated in the project was unintended but significant from psychological and social perspective. By changing the style of living the seniors, their physical and mental wellbeing improved.

Their families and community connected other changes made by project implementation with the improvement of understanding the psychological and social needs of elderly people. The members of families observed how the elderly people' life changed as the result of the participation in the project. They understood that seniors had their own psychological and social needs and the project was the chance for meeting them. In one case at the beginning the process of understanding was a kind of challenge because it changed the relations and division of roles in the family structure. In practice, this meant that one of senior ladies stopped looking after a grandchild and started to participate in the project. This new situation was a kind of challenge for family functioning but finally the members of family understood and accepted the new situation. The second interviewed senior's family member supported his mother's new interest and hobby and development of her social contacts. The new knowledge about seniors' needs and expectations was also recognised by the local community represented by the social organisations from Gdańsk. They were engaged in the process of recruiting the seniors to the project and collected their opinions about what kind of support they needed. The Okręgowy Związek Emerytów, Rencistów i Inwalidów from Gdańsk, local catholic church organisations and the Towarzystwo

Edukacyjne Wiedza Powszechna participated in the recruitment process and had the direct contacts with different age groups of seniors from Gdańsk. These social actors, which represent local civil society in Gdańsk, discovered the main problems of different groups of local seniors, even those who finally were not engaged in the project.

Table 6.2. The list and types of outcomes produced in the “Aktywni bez względu na wiek” project

Outcome s	Int.	Unint	Pos	Ne g.	Psyc h.	Socia l	Prim	Secon d.
New social contacts of beneficiaries	+		+		+	+		+
Involvement of beneficiaries in voluntary activities	+		+		+	+	+	
New language skills of beneficiaries	+		+			+	+	
New computer skills of beneficiaries	+		+			+	+	
New manual and artistic skills of beneficiaries	+		+			+	+	
Increase self-confidence of beneficiaries		+	+		+			+
Better mental wellbeing of beneficiaries	+		+		+		+	
Better physical wellbeing of beneficiaries	+		+		+		+	
Changing style of living by beneficiaries		+	+			+		+
New	+		+			+	+	

educational services for elderly people offered by the „Towarzystwo Edukacyjne Wiedza Powszechna”								
Better understanding the psychological and social needs of elderly people by families and community	+		+			+	+	
New job opportunities for educational services deliverers		+	+			+	+	
Intersectoral cooperation between „Towarzystwo Edukacyjne Wiedza Powszechna”, other social organisations and public sector		+	+			+	+	
Savings in the national health care system		+	+			+		+

Source: Own research based on data collected from individual semi-structured interviews with project stakeholders.

The outcomes produced in the project mostly refer to the elderly people who experienced a number of positive, both intended and unintended changes in their psychological and social situation. It means that existing theory of change about ASOS Programme described in the part 4 of this report was not only positively verified but also developed by turning up

new non-anticipated elements. The table contains the comparison of outcomes designed in the ASOS Programme with the others which were produced in the “Aktywni bez względu na wiek” project.

Table 6.3. The comparison intended outcomes produced in the „Aktywni bez względu na wiek” project with intended outcomes designed in the ASOS Programme

No	Intended outcomes designed in the ASOS Programme	Intended outcomes produced in the „Aktywni bez względu na wiek” project
1.	Increase of diversity and improvement the quality of educational services for elderly people	New educational services for elderly people offered by the Towarzystwo Edukacyjne Wiedza Powszechna
2.	Creation the conditions for inside and intergenerational integration of elderly people by using existed social infrastructure	New social contacts of beneficiaries
3.	Development the diversified forms of social activity containing voluntary services, participation in decision-making processes and public sphere and the contribution of elderly people in public policy development	Involvement of beneficiaries in voluntary activities
4.	Increased access and quality of social services and support for activities in the area of self-organisation and self-help	Involvement of beneficiaries in voluntary activities

Source: Ministerstwo Pracy i Polityki Społecznej, 2014: 10-11, own research based on data collected from individual semi-structured interviews with project stakeholders.

Analysis of the content of the table shows that both groups of outcomes are completely convergent and the desired changes in social activation of elderly people designed by ASOS Programme were reached in the project „Aktywni ze względu na wiek”.

The added results of the ASOS intervention, which have got intended and unintended character, refer to all project stakeholders. Although some of them were not anticipated in the process of the ASOS Programme elaboration and implementation, the impact evaluation of the "Aktywni bez względu na wiek" project shows that they were generated as the result of ASOS intervention. These unintended changes are significant not only for the project stakeholders but also for the public sphere development, inter-sectoral cooperation and local silver economy development. The silver economy is defined as "the economic opportunities arising from the public and consumer expenditure related to population ageing and the specific needs of the population over 50" (European Parliament, 2015: 2).

One of the crucial stakeholders which played important role in the process of "Aktywni bez względu na wiek" project elaboration and implementation was the NGO - Towarzystwo Edukacyjne Wiedza Powszechna. This social organisation specialises in educational activities and services delivering for civil society development. It offers trainings, courses and workshops in order to prepare different social groups for functioning in the conditions and challenges of global society and integrated Europe. It delivers knowledge and skills, which are needed to better understanding the current world. The organisation prepares the projects for different social and age groups: children, youth, seniors or Polish minority from the Eastern European countries (<http://tewp.org.pl>). Implementation the "Aktywni bez względu na wiek" project financed under the ASOS Programme influenced on the number and quality of the educational services development for elderly people in Gdańsk. Due to the fact of having financial public support, the organisation elaborated new programmes of courses, trainings and workshops for elderly people, which were tested and developed during the period of project implementation. The project coordinator reported that the organisation prepared the new educational services for elderly people like: kinesigerontotherapy training and memory training. This new services were accepted and positively judged by the seniors as the project beneficiaries so the organisation

Towarzystwo Edukacyjne Wiedza Powszechna was going to organise these types of trainings even after the project finishing. These new educational services appeared as the intended outcome of the project and have significant meaning for the silver economy development (European Commission, 2015). In this context the process of ageing of societies can be considered not only as the economic challenge but also as the source for stimulating the growth of new markets refer to elderly people needs. The development of new services can bring more growth and job at local level.

The educational needs of elderly people stimulated the new educational services creation. It also produced new job opportunities for service deliverers working in the “Aktywni bez względu na wiek” project. They were employed by the TEWP for delivering courses and trainings for elderly people and they declared that in the near future they were going to continue professional engagement in the work with elderly people and delivering services for this age group. For the English teacher, working with seniors was completely new professional experience but most of educational services deliverers had had this kind of experience before employment in the “Aktywni bez względu na wiek” project. The coach of kinesigerontotherapy told that he constantly developed his professional competences in the field of working with seniors and his labour market position was improved as the result of participation in the project.

Another added unintended outcome, which appeared in the project, was intersectoral cooperation between non-governmental organisations and public sector actors. The most visible cooperation was taken up between the Towarzystwo Edukacyjne Wiedza Powszechna which prepared project proposal and the Ministerstwo Pracy i Polityki Społecznej which selected the project and gave the financial support. Although these two actors did not cooperate directly, the system of ASOS Programme implementation was based on the rule that all tasks and activities have been implemented at local level. In the result the exchange of different types of resources was done. The Ministerstwo offered the financial support and the TEWP the idea, knowledge, experience in the field how to

activating the elderly people at the local level. Deeper cooperation was implemented between the TEWP and Miejski Ośrodek Pomocy Społecznej which is a unit of local self government, responsible for social support at the local community level. The MOPS's officers supported the TWEP in the process of recruitment the elderly people to the project. The same role was playing by the social organisation the Okręgowy Związek Emerytów, Rencistów i Inwalidów w Gdańsku, local Catholic Church organisations and the Uniwersytet Trzeciego Wieku from Gdańsk. Even though the scope of the cooperation was limited only to the initial phase of the project, the TWEP used the experience and knowledge offered by the partner organisations in order to recognise the elderly people needs and expectations and presented them the offer of the new educational services delivered by the project.

The last unintended outcome noted in the project by the University of Wrocław research team was probable savings in the national health care system. It is difficult to measure what amount of funds would be saved if the seniors participating in the projects were limited their visits in the physician's office. The Polish health care system is financed from public funds and the National Health Fund pays every medical consultation. If beneficiaries declared that due to the project their physical and mental wellbeing have improved and they reduced the number of meeting with the doctors, we assume that it led to the reduction of public expenditure for health care of elderly people. The amount of savings will be measured in the next chapter of the report by doing the SROI analysis.

Part of outcomes, which were produced by the project, are measurable by the system of quantity indicators. The list of quantity indicators contains the table 6.4.

Table 6.4. Quantity indicators of outcomes produced in the "Aktywni bez względu na wiek" project

N o.	Name of indicator	Value of indicators	Source of information
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1.	The number of new social relations initiated by beneficiaries of project	32	<ul style="list-style-type: none"> • Semi-structured interviews with beneficiaries of project
2.	The number of new voluntary activities taken up by beneficiaries after finishing the project	5	<ul style="list-style-type: none"> • Semi-structured interviews with beneficiaries of project • Semi-structured interview with the project coordinator
4.	The number of new educational services provided for elderly people	2	<ul style="list-style-type: none"> • Semi-structured interview with the project coordinator • Semi-structured interview with the service-deliverers • Final report from the project implementation
5.	The number of actors participated in the process of preparation, implementation and financing the project	5	<ul style="list-style-type: none"> • Semi-structured interview with the project coordinator • Final report from the project implementation

Source: Own research based on data collected from individual semi-structured interviews with project stakeholders and project documentation analysis.

Some of outcomes produced in the project are immeasurable by quantitative indicators but they can be assessed based on the project stakeholders' opinions expressed in the semi-structured individual interviews and focus interview. The outcomes, which can't be measured by quantitative indicators, refer to the changes, which have got psychological character, in the area of peoples' mentality and subjective feelings like physical and mental wellbeing.

It has to be considered that the findings from above presented analysis are based on the one case study n=1 which means that making

general conclusions based on the n=1 case study for the ASOS Programme is limited. This project is representative for the ASOS Programme only from the qualitative perspective and this is the proper example for the research and explanation how the Programme operates and what are the possible outcomes produced by the programme. The impact evaluation of the “Aktywni bez względu na wiek” project shows what changes and outcomes can be caused by this kind of intervention (the ASOS Programme) but it is not the final list of possible variables of the outcomes, which can appeared. The following context of the project implementation should be considered if the issue of generalisation of findings from this impact evaluation is taken into account:

1. The “Aktywni bez względu na wiek” project had got local character. Although the ASOS Programme was established at the governmental level, the implementation had got strictly local character. Every time when the exemplified project is evaluated, the researchers should take into account social, cultural and economic context of its implementation.
2. The project was implemented in the city of Gdańsk which is a capital of Kujawsko-Pomorskie region and where local authorities have created active local senioral policy. It means that the different types of support and instruments of senioral policy are implemented in Gdańsk and the considered project is one among many initiatives of this type.
3. The beneficiaries of the project were the selected group of seniors: less educated, in difficult financial situation, sometimes affected by a slight disability, risked of exclusion, who were able to be active but were not able to develop tie activity in the formula of the University of the Third Age.
4. The group on interviewed seniors was overrepresented by women who were much more willing in taking part in research then the men supported by the project

The generalisation of findings from this impact evaluation can be valid when the comparative research of more case study projects will be

conducted. The number of evaluated projects should be $n > 1$. Our aim was to deliver the research, which explores the outcomes of the ASOS Programme, based on selected example. The University of Wrocław research team discovered that the ASOS Programme is the innovative instrument of senioral policy in Poland from two main reasons:

1. This is the first intervention in the framework of the senioral policy in Poland the main objective of which is different from existing programmes and projects. Every public intervention before the ASOS Programme which was oriented on elderly people focused on the goals connected with the seniors' situation on labour market, especially the professional activation of unemployed people at age 50+ or the improvement of social security of elderly people who have been retired (Tomczyk and Klimczuk, 2015: 69, ministerstwo Pracy i Polityki Społecznej, 2008). The ASOS programme has been the first systemic intervention which aim refers to support and develop social activity of elderly people in order to improve their quality of live at national level. This is the first social activation programme for seniors in Poland, which is programmed at central level and implemented at the local one. It emphasises the significance of educational services for the older people social activation development.
2. The results of the implementation of the ASOS Programme which were evaluated based on the selected case study ("Aktywni bez względu na wiek" project) are supportive for silver economy development. New educational and other social services, which are offered for seniors by the ASOS Programme, create new market of products and services which is the response for elderly people needs and expectations. This process has changed the traditional understanding of population ageing as the social and economic problem towards the new interpretation of this phenomenon, as the opportunity for economic growth.

7. Economic evaluation

7.1 Introduction

In this section we will set out the economic evaluation questions and discuss the choice of a Social Return on Investment (SROI) analysis as the methodology of the economic evaluation of the ASOS Programme based on the example of the case study “Aktywni bez względu na wiek” project. We are going to examine the relationship between the project costs and its outputs and if the achieved results justify those costs.

The economic evaluation of Government Program for the Elderly Social Activity in Poland based on the selected project will be implemented with using the Social Return on Investment model of analysis. This method seems to correspond as it is a framework for measuring and accounting for this much broader concept of value, rather than money and measures change in ways that are relevant to the seniors and their families. We will use the SROI on its seven principles: involve stakeholders, understand what changes, value what matters, only include what is material, do not over-claim, be transparent and verify the result (Nicholls et al., 2009: 9).

Research questions for SROI:

1. Who are the key-stakeholders of the “Aktywni bez względu na wiek” project?
2. What is the input, activity, output and impact of the “Aktywni bez względu na wiek” project as perceived by the key-stakeholders?
3. What are true costs of the “Aktywni bez względu na wiek” project?
4. What is the deadweight of the “Aktywni bez względu na wiek” project?

5. What was the economic and social impact of the “Aktywni bez względu na wiek” project?
6. What are the opportunities of the “Aktywni bez względu na wiek” project to increase their social impact?

We assume that Social Return on Investment (SROI) analysis provides a set of tools and skills that can be helpful to a full understanding of how NGO’s work translates into results. The target group of elderly is chosen, because it is a growing group caused by the proportional rise in the ageing population.

7.2 Methodology

The economic evaluation will be taken in six phases (Nicholls et al., 2009: 9-10):

Stage 1. Establishing scope and identifying key stakeholders of the ASOS Programme in Poland, based on the example of our case study project

Stage 2. Mapping outcomes. Through engaging with stakeholders we will develop an impact map (theory of change), which shows the relationship between inputs, outputs and outcomes of the analysed project. We will take into consideration all appeared outcomes intended and unintended, positive and negative.

Stage 3. Evidencing outcomes of project and giving them a value by using the SROI analytic tool. At the beginning of this step we will elaborate at least two outcome indicators (one objective and second subjective). Then we will establish how long these outcomes last. Then the process of putting the value for the outcomes will be implemented

Stage 4. Establishing impact of the case study project

Stage 5. Calculating the SROI for seniors activity project

Stage 6. Reporting, using and embedding.

The stages of the SROI methodology were

Point 7.2.1. covers the stage 1 and 2 of the SROI methodology. The Point 7.2.2. covers the stage 3 of the methodology. Point 7.2.3. covers stage 4, and the points 7.2.4, 7.2.5, 7.2.6, 7.2.7 cover stage 5. The stage 6 covers the whole economic evaluation. Point 7.3. covers the interpretation of the result of SROI for "Aktywni bez względu na wiek" project.

7.2.1 The scope of the analysis

The primary purpose of the analysis of social return on investment was the opportunity to obtain information on the value generated for the Towarzystwo Edukacyjne Wiedza Powszechna in the framework of the "Aktywni bez względu na wiek" project.

With the methodological assumptions it will allow the economic evaluation as an extension of impact evaluation in the frames of InnoSi project. In addition, the report of the SROI may constitute a basis for planning the next edition of the project and increase the effectiveness of activities undertaken within the next edition of the "Aktywni bez względu na wiek" project.

After initial talks with InnoSI project leader and the coordinator of the "Active Regardless of the age" project, a simplified plan of the project (Table 7.1.) was developed. The analysed period is determined by the duration of the first edition of the "Aktywni bez względu na wiek" project.

Table 7.1. Project plan for SROI analysis for the "Aktywni bez względu na wiek" project.

Scope of analysis	The first edition of the "Aktywni bez względu na wiek" project implemented by Towarzystwo Edukacyjne Wiedza Powszechna
Work plan	Two analysts independent from the organization carried out the analysis. The analysis was carried out from June to October 2016.
Sources	+ access to stakeholders + access to project documentation + access to project reports - small team of analysts

	- the scarcity of financial resources
Analysed period of time	From 01-04-2015 till 31-12-2015

Source: own research

The scope of the SROI analysis represents the scope of the second edition of the “Aktywni bez względu na wiek” project implemented in the period of one year. Some of the projections for the impact of the project are based on the experience from the first edition of the project.

The scope of the outcomes experienced by stakeholders are related with the number of the beneficiaries of the second edition of the project. Once again, the period over which the outcomes are projected to occur are based on the experience of previous project participants and similar projects outcomes.

The activities included in the scope of the analysis are those activities that were delivered in the frames of the “Aktywni bez względu na wiek” project. These activities are outlined in the funding agreement between the Towarzystwo Edukacyjne Wiedza Powszechna and the Ministerstwo Pracy i Polityki Społecznej.

Identifying stakeholders

Towarzystwo Edukacyjne Wiedza Powszechna obtains its funds from a grant submitted by the public sector (mainly Gdańsk municipality and the Ministry of Labour and Social Policy). The main income of the organisation comes from unpaid public benefit, including mainly the state funds and European funds.

The SROI analysis from the perspective of Towarzystwo Edukacyjne Wiedza Powszechna was assumed, due to its role as the key stakeholders of the project. At the same time we included in the analysis other stakeholders, for whom the “Aktywni bez względu na wiek” project could bring direct and indirect benefits.

Based on the analysis of the project documentation of Towarzystwa Edukacyjnego Wiedza Powszechna, we managed to select the following

persons directly or indirectly involved in the "Aktywni bez względu na wiek" project (see Table 7.2.)

Table 7.2. The list of all those who affect or are affected by the "Aktywni bez względu na wiek" project.

Lp	Group of people
1	Project participants - Elderly people
2	Members of the participant's families
3	Distant family members of participants
4	Friends of participants
5	Members of the local community
6	Members of Towarzystwa Edukacyjnego Wiedza Powszechna
7	Workers of Towarzystwa Edukacyjnego Wiedza Powszechna
8	Volunteers of Towarzystwa Edukacyjnego Wiedza Powszechna
9	Cooperating entities
10	Local authorities - the municipality Gdańsk
11	State - Ministry of Labour and Social Policy

Source: own research

Among these groups we have selected these with the key importance for generating added value and achieve the objectives of the "Aktywni bez względu na wiek" project". The rest was rejected. Justification is presented in the table 7.3. In the table you could see that a reason is given for each decision. Each decision was often based on a broad understanding of the outcomes for each stakeholder.

Table 7.3. Key stakeholders of the "Aktywni bez względu na wiek" project.

Lp	Key stakeholders	Reason for inclusion
1	Project participants - Elderly people	- beneficiaries who are likely to be experiencing significant outcomes if intervention is successful
2	Members of the elderly people's families	- improvement in health and activeness of participants is likely to have a significant impact on members of the families
3	Friends of participants	- improvement in health and activeness of participants is

		likely to have a significant impact on friends of participants. Sometimes it can even be a reason for them to take part in such projects
5	State - Ministry of Labour and Social Policy	- proxy for wider benefit to society. The state is the investor for the project.
	Excluded stakeholders	Reason for exclusion
6	Members of the local community	- benefits too scattered to be measured during the analysis
7	Members of Towarzystwa Edukacyjnego Wiedza Powszechna	- deadweight, they are interested in different project implemented by Towarzystwo Edukacyjne Wiedza Powszechna
8	Workers of Towarzystwa Edukacyjnego Wiedza Powszechna	- deadweight, the if it they didnot worked in the "Aktywni bez względu na wiek," project, they would probably find employment in another one
9	Volunteers of Towarzystwa Edukacyjnego Wiedza Powszechna	- deadweight, the if it they didnot worked in the "Aktywni bez względu na wiek," project, they would probably volunteer in another one
10	Cooperating entities	- benefits too scattered to be measured during the analysis
4	Local authorities - the municipality Gdańsk	- benefits too scattered to be measured during the analysis

Source: own research

The information on benefits for individual groups of beneficiaries was obtained in a direct way. Interviews with beneficiaries, their children, and further family members were the primary data source. We also have collected some information from the focus group.

The interviews with the beneficiaries gave a lot of information about their awareness of the needs and the profits that they got from the participation in the "Aktywni bez względu na wiek". The participants know what was important for them and what generated their benefits. Children and further family members as well as friends were those the project has effected indirectly. However they have noticed the change in the elderly

attitude and were able to show the benefits the participants got by taking part in the project. Some of the family members and friends were encouraged by these benefits to take part in the next edition of the project.

Additionally we also used a number of materials from both the official website (<http://tewp.org.pl/projekty/aktywni-bez-względu-na-wiek,26>), as well as project documentation provided directly by the board of Towarzystwo Edukacyjne Wiedza Powszechna. In the case of the lack of necessary data we have made the estimation, which is fully consistent with the approach the New Economics Foundation [Nicholls et al., 2009; 17].

On the basis of information relating to participants, children and family members, as well as friends we prepared a table showing their needs and their correlation with the objectives of the "Active regardless of the age" project (Table 7.4.).

Table 7.4. The key stakeholder's aim and the objective of the "Aktywni bez względu na wiek" project.

Key stakeholders	GOALS	Objective of the project
Project participants - Elderly people	spending free time in an attractive way, making new friends, acquiring of knowledge and skills, improve mental and physical health,	Increasing diversity and improving the quality of learning opportunities for elderly
Members of the elderly people's families	caring for increasing the activity of the elderly, caring for elderly staying in good health,	
Friends of participants	caring for increasing the activity of the elderly friends,	
State - Ministry of Labour and Social Policy	increasing diversity and improving the quality of learning opportunities for older people.	

	<p>creating the conditions for integration between and within the elderly using the existing social infrastructure development of various forms of social activities, including the promotion of voluntary work, participation in decision-making processes, including the elderly involvement in shaping public policy. increasing the availability, improving the quality of social services and support activities for self-help and self-organization</p>	
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Source: own research

Table 7.5. The way the key stakeholder's were involved.

Key stakeholders	SIZE OF GROUP	No. INVOLVED	HOW INVOLVED
Project participants - Elderly people	60	9	Semi-structured interviews
Members of the elderly people's families	Approx. 90	2	Semi-structured interviews
Friends of participants	Approx. 60	1	Semi-structured interviews
State - Ministry of Labour and Social Policy	N/A	N/A	project documentation

Source: own research

To illustrate the changes occurring as a result of the “Aktywni bez względu na wiek” project an impact map was built (see Table 7.7).

Table 7.6. Mapping of the impact of the “Aktywni bez względu na wiek” project

Key stakeholders	Inputs	Activity	Intended/unintended changes	Products	Outcomes	Impact
Project participants - Elderly people	time	- participation in workshops and training	Improving the physical health Integrating community participants Improving the mental health of participants Better solving life, legal and social problems Activating participants to volunteer work	- number of hours of training and workshops,	- new social contacts of beneficiaries - involvement of beneficiaries in voluntary activities - new language skills of beneficiaries - new computer skills of beneficiaries - new manual and artistic skills of beneficiaries - increase self-confidence of beneficiaries - better mental wellbeing of beneficiaries	elderly are more active in their life, they know more about the health and taking care of themselves, they have need IT skills, they have language skills they feel they can be volunteers and help other people especially disable elderly persons in their own families

					- better physical wellbeing of beneficiaries - changing style of living by beneficiaries	
Members of the elderly people's families	time	- supporting the participants	Improving the physical health and mental health of elderly members of the families		- better understanding the psychological and social needs of elderly people by families	members of the family understand better the needs and the role of elderly members of their families, Hey also feel happier because their parents are more active, they feel better, have better physical health and mental health
Friends of participants	time	- supporting the participants	Improving the physical health and mental health of	- number of friends, who will take part in such	- better understanding the psychological	some of the friends of participants are interesting

			friends	projects	and social needs of elderly people by community	in taking part in such project, They see that the participants have better physical health and mental health and are more active
State - Ministry of Labour and Social Policy	Funding	financing	increasing diversity and improving the quality of learning opportunities for older people. creating the conditions for integration between and within the elderly using the existing social infrastructure development of various forms of	- number of elderly people receiving support within this project	- savings in the national health care system	improving the quality and level of life of older people for the dignified aging through social activity

			social activities, including the promotion of voluntary work, participation in decision-making processes, including the elderly involvement in shaping public policy. increasing the availability, improving the quality of social services and support activities for self-help and self-organization			
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Source: own research

We assume that generated effects will be long-term, in the analysis of SROI consider them in the next 3 years from the completion of the project and we have taken into account at the drop-off at the level of 40%.

7.2.2 Assembling cost data

The data gathered for the SROI analyses were collected through:

1. Quantitative methods

- primary quantitative data: financial reports and progress reports to funder, covering the offer of Towarzystwo Edukacyjne Wiedza Powszechna for the implementation of a public funding, evaluation report of the “Aktywni bez względu na wiek” project and the final report on the implementation of a public funding "Aktywni bez względu na wiek".

2. Qualitative methods

- 6 individual, semi-structured interviews with the representatives of the beneficiaries of the “Aktywni bez względu na wiek” project
- 2 individual, semi-structured interviews with family members of the beneficiaries of the project
- 4 individual, semi-structured interviews with the service deliverers the “Aktywni bez względu na wiek” project
- 1 individual, semi-structured interview conducted with the “Aktywni bez względu na wiek” project’s coordinator
- 1 focus group with 3 representatives of the project beneficiaries

For the SROI analysis we have taken the direct project expenditure, which are reflected in the project documentation, especially in the evaluation report of the “Aktywni bez względu na wiek” project and the final report on the implementation of a public funding "Aktywni bez względu na wiek". The additional source of the data for estimating the expenditure of the project was the semi-structured interviews with manager of the project.

For the need of economic evaluation we had also assumed the possibility of costs incurred by Programme recipients. We verified the possible occurrence of them in the frames of interviews with project

beneficiaries and family members of the beneficiaries of the project. The possible occurrence of the costs incurred by co-operating agencies was verified by interviews with stakeholders engaged in the process of creation and implementation of the project.

Table 7.7. Choosing indicators for the results measurement of the "Aktywni bez względu na wiek" project

Outcome	Indicator	Source of data	Monetisation
- Better physical wellbeing of beneficiaries	Reducing spending on medicaments	semi-structured interviews with the representatives of the beneficiaries of the "Aktywni bez względu na wiek" project	Yes
- New social contacts of beneficiaries	Participants reporting increase in self-confidence and social skills	semi-structured interviews with the representatives of the beneficiaries of the "Aktywni bez względu na wiek" project	No
- Better mental wellbeing of beneficiaries	Reducing spending on antidepressants and mental help	semi-structured interviews with the representatives of the beneficiaries of the "Aktywni bez względu na wiek" project	Yes
- Changing style of living by beneficiaries	number of hours spending with friends	semi-structured interviews with the representatives of the beneficiaries of the "Aktywni bez względu na wiek" project	No
- Increase self-confidence of beneficiaries	Participants reporting increase in self-	semi-structured interviews with the	No

	confidence	representatives of the beneficiaries of the “Aktywni bez względu na wiek” project	
- New manual and artistic skills of beneficiaries	Participants reporting increase in manual and artistic skills	semi-structured interviews with the representatives of the beneficiaries of the “Aktywni bez względu na wiek” project	No
New language skills of beneficiaries	Participants reporting increase in language skills	semi-structured interviews with the representatives of the beneficiaries of the “Aktywni bez względu na wiek” project	No
New computer skills of beneficiaries	Participants reporting increase in computer skills	semi-structured interviews with the representatives of the beneficiaries of the “Aktywni bez względu na wiek” project	No
Involvement of beneficiaries in voluntary activities	Participants join clubs, and/or develop new social networks	semi-structured interviews with the representatives of the beneficiaries of the “Aktywni bez względu na wiek” project	No
- Activation in helping elderly members of the families with disabilities or grandchildren	number of hours that participants can dispense with professional care	semi-structured interviews with family members of the beneficiaries of the project	Yes

- Better understanding the psychological and social needs of elderly people by families and community	members of the families reporting better relations with elderly people in their families	semi-structured interviews with family members of the beneficiaries of the project	No
- New educational services for elderly people offered by the Towarzystwo Edukacyjne Wiedza Powszechna	Coordinator of the project reporting the educational services for elderly people	semi-structured interviews with coordinator of the project	No
- Intersectoral cooperation between Towarzystwo Edukacyjne Wiedza Powszechna, other social organisations and public sector	Coordinator of the project reporting the possibility of intersectoral cooperation	semi-structured interview with coordinator of the project	No
- New job opportunities for educational services deliverers	Participants reporting increase in job opportunities	semi-structured interviews with the representatives of the beneficiaries of the "Aktywni bez względu na wiek" project	No
- New job opportunities for educational services deliverers	Number of trainings and workshops offered for elderly people by services deliverers	semi-structured interviews with the service deliverers the "Aktywni bez względu na wiek" project	No
- Savings in the national health care system	reducing spending on medicaments	ASOS documentation	Yes

Source: own

In order to complement the quantitative data interviews with the beneficiaries of the “Aktywni bez względu na wiek” project were done. This information is supplemented by the in-depth interview research conducted with the project’s “Aktywni bez względu na wiek” coordinator, semi-structured interviews with the services deliverers.

The monetarisation was also based on the secondary quantitative data (from public and non-public institutions on the monetarisation on social values), documentation of the “Aktywni bez względu na wiek” project and the project’s evaluation.

Table 7. 8. Summary of investment of the "Aktywni bez względu na wiek" project

Key stakeholder	Value [PLN]	Use of funds
State - Ministry of Labour and Social Policy	148 340,00	Substantive costs related to the implementation of the project The cost of servicing tasks, including administrative and equipment Costs of promotion and information
Towarzystwo Edukacyjne Wiedza Powszechna	18 160,00	Substantive costs related to the implementation of the project The cost of servicing tasks, including administrative and equipment
Combined investment	166 500,00	

Source: own research

7.2.3 Estimated impact of programme

In order to ensure that the SROI evaluation is accurate, it is necessary to also look at the effects of attribution, displacement, deadweight and drop-off and incorporate them into the final calculation. These terms are defined below.

Deadweight is defined as effects, which would have arisen even if the public expenditure programme had not taken place. Deadweight usually arises as a result of inadequate programme delivery mechanisms (organizational solutions provide specific beneficiaries good and services funded by the program). This is especially so when these mechanisms are not properly oriented on the program's intended beneficiaries. As a result, other people or even groups of people that do not belong to the target population, become beneficiaries of the benefits generated by the programme or the project. To estimate how much of the change will happen anyway, the stakeholders were asked to estimate the degree to which they believe the change will occur anyway.

The “Aktywni bez względu na wiek” project was fully implemented based on the extend funds from the ASOS program. Towarzystwo Edukacyjne Wiedza Powszechna has received the full financial support for the “Aktywni bez względu na wiek” project. In the interview, the project’s coordinator has pointed that the support has enabled the organisation to realise the activities for older people and that it would not be able without the extend funds. In this case we are talking about effect of dependent event, as the project of the activities for older people was possible to be implemented only because of financial assistance. This is also confirmed by the decision of the organisation for the failure to execute actions within the further edition of the project when in 2016 the organization has not received the funding. We estimated the deadweight for the “Aktywni bez względu na wiek” project = 3% and the additionality for the “Aktywni bez względu na wiek” project = 100%. Deadweight = 3%, because 2 persons out of 60 would have the outcomes without taking part in the “aktywni

bez względu na wiek project”.

An estimate of how much of the change could be a result of other stakeholders or activities that were not included in the project were determined through stakeholder engagement. Stakeholder engagement was used to identify if any of the outcomes will displace other activities. No activities were identified that will be displaced as a result of the activities of the program.

Drop-off explores how the benefits derived from each outcome are likely to reduce over time. It refers to how long an outcome lasts for. It is important to include any reductions when calculating the values to ensure a better degree of accuracy. The “Aktywni bez względu na wiek” project was designed and developed as a 1-year project and it was the second edition of a project like that. It seems fair to assume that anything beyond that time could mean a reduction in the effects of the outcomes. For the purposes of this SROI we have worked on the basis of zero drop-off during the lifetime of the project. Drop-off recognises that outcomes may continue to last for many years but in the future may be less or, if the same, will be influenced by other factors. Through interviewing the stakeholder, it was projected that outcomes experienced during the project will last at least 3 years after the ending of the project, so the drop-off rate is estimated at 40% per annum after the program. We realise that the outcome which is connected with taking care of elderly members with participants families may not last that long. That is way in this case we project the outcome at last 2 years.

Attribution is a key factor for an accurate measure of impact of the “Aktywni bez względu na wiek” project. Many of the outcomes are due to more than one service deliverers working with or supporting beneficiaries of the project. However, the role of the Towarzystwo Edukacyjne Wiedza Powszechna is pivotal in getting those services in place. Without Towarzystwo Edukacyjne Wiedza Powszechna input, their assessment and signposting, many of those clients may not have been identified to the voluntary sector. There is a need to recognise the influence of other

people/services on the outcomes achieved in accurately assessing social value. Based on stakeholder interviews, and participants expressed, we estimated the attribution for “Aktywni bez względu na wiek”, we have estimated the percentage of the outcome that can be attributed to others and provide the rationale for these estimates at 0%. Attribution = 0%, because none of the beneficiaries was supported by another other programme or project, what makes the “Aktywni bez względu na wiek” the only contribution to the outcome.

7.2.4 Estimated monetary value of outcomes

Table 7.9. The financial proxy of the benefits generated from the "Aktywni bez względu na wiek" project

Indicator	Information source	Duration	Financial proxy	Counting	Value [PLN]	Displacement [%]	Deadweight [%]	Attribution [%]	Drop off [%]	Impact [PLN]
Reducing spending on medicaments	semi-structured interviews with family members of the beneficiaries of the project	3 years	50 PLN	50 participants times 12 months	36000	0%	3%	0%	40%	29100,00 PLN
Reducing spending on antidepressants and mental help	semi-structured interviews with family members of the beneficiaries of the project	3 years	50 PLN	50 participants times 12 months	30000	0%	3%	0%	40%	29100,00 PLN
Hour per week of care dispensed with professional care	semi-structured interviews with family members of the beneficiaries of the project	2 years	12 PLN	30 participants times 2 hours per week	34560	0%	3%	0%	40%	33523,20 PLN
Reducing spending in the national health care system	ASOS 2014-2020 documentation	3 years	50 PLN	50 participants times 12 months	30000	0%	3%	0%	40%	29100,00 PLN

Source: own research

To present an accurate view of the value created through the “Aktywni bez względu na wiek” project, valuation filters (SROI filters) are applied to the financial proxies. This is in accordance with the SROI principle of not over-claiming. Different techniques were used to identify the most appropriate filter for each of the outcomes.

For establishing the value of the additionally, the assumption was taken that the greater the extent of the project implementation is depended on the external funds, the greater is the effect of additionality. When the project was independent of external resources we talk about deadweight effect (result of events occurring independently).

Table 7.10. The value of the benefits generated from the "Aktywni bez względu na wiek" project

Indicator	Discount rate 3,5%		
	Year 1 (after activity)	Year 2	Year 3
Reducing spending on medicaments	29100,00 PLN	17460,00 PLN	10476,00 PLN
Reducing spending on antidepressants and mental help	29100,00 PLN	17460,00 PLN	10476,00 PLN
Hour per week of care dispensed with professional care	33523,20 PLN	20113,92 PLN	-
Reducing spending in the national health care system	29100,00 PLN	17460,00 PLN	10476,00 PLN

Source: own research

7.2.5 Calculate present value and assess efficiency

Calculating the SROI for seniors activity project

$$SROI = \frac{\text{net present value of benefits}}{\text{net present value of investment}}$$

- Total Inputs (TI);
- Value of Impact (CF);
- Present Value (PV);
- Net Present Value (NPV)

Total Inputs:

$$TI = \sum_{n=1}^{\infty} I_n$$

where:

TI - Total Inputs

I - Input

Total Present Value (PV):

$$PV = \sum_{n=1}^{\infty} \frac{CF_n}{(1+r)^n}$$

where:

PV - Total Present Value;

CF - Value of Impact for each year

r - discount rate, i.e. the rate of waiver of future measures to the present day cash, including interest rate risk (for the public sector assume 3.5%). The rate shows the proportions in which future capital equates the effective value of the current assets.

Having calculated the Total Present Value of our benefits, we deduct the value of our inputs (the investment) to arrive at the Net Present Value (NPV) according to the formula:

$$NPV = PV - TI$$

where:

NPV - Net Present Value;

PV - Total Present Value;

TI - Total Inputs.

Table 7.11. The value of SROI from the "Aktywni bez względu na wiek" project

	Year 1	Year 2	Year 3
Present value of each year (after discounting)	116737,39 PLN	67673,85 PLN	28346,26 PLN
Total Present Value (PV)			212757,50 PLN
Net Present Value (NPV)			46257,50 PLN
Social Return PLN per PLN			1,28

Source: own research

Working through the SROI process we can see that the total of impact values of the "Aktywni bez względu na wiek" project in the third year is 28 346,26 PLN. The Total Present Value for the project including the 3.5% discount is 212 757,50 PLN. As a result the Net Present Value (NPV) is 46 257,50 PLN which means that no extra financial value was created by the "Aktywni bez względu na wiek" project. These figures give us an SROI ratio of the net present value divided by total investments = 1,28 PLN per 1 PLN invested. This means that for every 1 PLN of investment in "Aktywni bez względu na wiek" project, 1,28 PLN social value has been created.

7.2.6 Distribution of costs and benefits

The distribution of costs and benefits is not equal. The biggest costs of supporting the activity of elderly people are public spending. Much smaller are the costs of non-public organization and the smallest are the costs of the programme beneficiaries. These costs also apply to their families.

As mention above, the “Aktywni bez względu na wiek” project was co-financed by the Ministerstwo Pracy i Polityki Społecznej in the frames of ASOS 2014-2020. That was the biggest economic cost of “Aktywni bez względu na wiek project” implementation. It is a public spending on incising the social activity of elderly people in Poland.

The costs of the NGO are the immeasurable indicator. They are largely related to the regular activities taken by these organizations. For example, housing conditions where the training and workshops take place must be suitable for the elderly. This means, for example, that the premises could not be located on a high floor with no elevator, thus limit elderly people with disabilities from participating in the project. Due to the frequent diseases associated with hypertension, favourable conditions are also air-conditioned room. This means that the project involves the organization of the costs, which do not take into account the implementation of the ASOS Programme.

These costs are also associated with longer time, which is needed to find the right deliverers of services for elderly people. In this context, the expense is to obtain qualified staff, which can lead trainings and workshops with elderly people. Colleges and universities in Poland increasingly offer courses aimed at the education of professional staff, often concerns the rehabilitation or gymnastic classes for the elderly people. Nevertheless, the number of the staff is still insufficient.

The SROI analysis failed to measure the costs that may appear on the side of families of project participants. In the context of Poland, the elderly people after retirement very often help their children taking care of small grandchildren. For parents it is a big financial advantage, since they

may give up the services of a babysitter or a paid nursery or kindergarten. Sometimes the elderly people take also care for older elderly, for example their own parents.

In a situation where elderly people increase their social activity this could mean that their willingness to take care of the grandchildren will be smaller than before. This means, therefore, that the need for babysitter, at least for a dozen or so hours a week.

The research shows that the motivation to participate in such projects as "Aktywni bez względu na wiek" is the lack of having to care for their grandchildren. Grandchildren when the grandchildren go to kindergarten (they are 3 years-old) or a school (they are 6 years-old), grandparents recognize that they do not have to take care for them especially in the morning and can devote this time for themselves.

On the other hand, better physical and mental wellbeing, help grandparents to take care for the grandchildren, because this is not a big burden for them physical and mental health. In addition, as a result of the knowledge acquired in the classroom, they can also better take care for their own parents or disabled partners.

On one hand the implementation of the project causes some costs on the side of the beneficiaries' families. On the other hand, it is however the benefits not only for the beneficiaries themselves but also for their families.

In a broader context, it is worth to analyse the benefits that are obtained by the state from increased social activity of elderly people. These benefits will arise from the well being of elderly people, their social activity, which means that they will need less the health care. Through the physical training they will feel better which may cause less physical and mental health care needs.

It is worth noting that the target group of, which is headed the project and the programme will be in the future, constitute a significant part of the population in Poland. Strengthening activities, dedicated to elderly people, which will increase the benefits for the beneficiaries, as

well as their families will have a positive impact on the social situation in Poland. Failure of this type of action will certainly have a negative impact on this part of the population and may contribute to increased problems resulting from the aging population.

The distribution of costs and benefits in this case does not mean that it must be equal. The effective implementation of solutions that prepare the society for the aging process and preventing their negative effects is much more important.

7.2.7 Sensitivity analysis

As with any financial modelling, it is expected that any changes in the variables would result in changes to the SROI ratio. This sensitivity analysis is a useful indicator of which variable/s have the most significant impact on the ratio.

For example, if impact is very sensitive to the number of people benefiting, the assumption about the number of people projected to be involved in the project can be varied to show how the projected impact changes. In this case, a valuable metric for the number of beneficiaries to watch going forward will be the actual recorded benefit per person.

Scenario 1. All of the variables are very sensitive so the new deadweight assumption for this outcome is 99%

Table 7.12. The value of the benefits generated from the "Aktywni bez względu na wiek" project with maximum value of deadweight

Indicator	Displacement [%]	Deadweight [%]	Attribution [%]	Drop off [%]	Impact [PLN]	Year 1	Year 2	Year 3
Reducing spending on medicaments	0%	99%	0%	40%	300,00	300,00	180,00	108,00
Reducing spending on antidepressants and mental help	0%	99%	0%	40%	300,00	300,00 zł	180,00 zł	108,00
Hour per week of care dispensed with professional care	0%	99%	0%	40%	345,60	345,60	207,36	-
Reducing spending in the national health care system	0%	99%	0%	40%	300,00	300,00	180,00	108,00

Source: own research

Working through the SROI process, when the deadweight is 99%, after 3 years the SROI ratio of the net present value divided by total investments = 0,01 PLN per 1 PLN invested in the "Aktywni bez względu na wiek" project. This means that for every 1 PLN of investment in "Aktywni bez względu na wiek" project 0,01 PLN social value has been created.

Scenario 2. All of the variables are very sensitive so the new drop-off assumption for this outcome is 100%

Table 7.13. The value of the benefits generated from the "Aktywni bez względu na wiek" project with maximum value of drop-off

Indicator	Deadweight [%]	Displacement [%]	Attribution [%]	Drop off [%]	Impact [PLN]	Year 1	Year 2	Year 3
Reducing spending on medicaments	3%	0%	0%	100%	29100,00	29100,00	0,00	0,00
Reducing spending on antidepressants and mental help	3%	0%	0%	100%	29100,00	29100,00	0,00	0,00
Hour per week of care dispensed with professional care	3%	0%	0%	100%	33523,20	33523,20	0,008	0,00
Reducing spending in the national health care system	3%	0%	0%	100%	29100,00	29100,00	0,00	0,00

Working through the SROI process, when the drop-off is 100%, after 3 years the SROI ratio of the net present value divided by total investments = 0,70 PLN per 1 PLN invested in the "Aktywni bez względu na wiek" project. This means that for every 1 PLN of investment in project 0,70 PLN social value has been created.

7.3 Results

Throughout this economic evaluation, after the SROI, it has been calculated that for every 1 PLN of investment in "Aktywni bez względu na wiek" project, social value has been created of 1,28 PLN.

For judgment of the result it is worth to notice that we were trying to estimate if the result of SROI could be higher. There are some findings that

are important in the frames of SORI analyses. Some of the outcomes and indicators were not measurable or not possible to estimate in the Polish conditions. We decided that we would take in to account only the measurable and possible to estimate indicators. Because the ASOS programme is an innovative line of public spending we expect that with the development of the Programme the indicators will be easier to estimate in future.

SROI allows for better understanding of the role and the importance of shareholders. To identify the stakeholder in the elderly people social activity support we used the case studies from other European countries. We believe that in Poland the stakeholders are the same or similar. Elderly people are not very socially active that why we believe that it can be changed in future also because of ASOS Programme. That may cause that some new stakeholder will appear.

It is worth to notice, that even the lowest economic return on social investment cannot be the reason to discontinue investments in the activity of elderly people. Successful investing in active aging is in truth a considerable financial burden on the state budget with a low economic income, but not less of it is now undeniable necessity.

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