



Community & Collaboration

First Meeting of the TAO Evaluation and Advisory Board

Summary of Results

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<http://www.thirdageonline.eu>

Management Summary

The dynamics of the first meeting were very positive. The management of the Board was evaluated as very successful. It was suggested, however, to additionally invite representatives from German political partners as well as from Wikimedia for the second round of the evaluation process.

The main recommendations of the members of the Evaluation and Advisory Board included:

- increase focus
- take the end-user perspective in terms of their perceived interests and motivations (handbook must meet user needs, take offline activities into account, conduct a life-event approach)
- think in terms of business models, sustainability, and commercialization beyond the consortium
- research must control for socio-demographic factors and include end-users
- Know-how transfer within the consortium and beyond the project should go hand in hand

In the context of further activities and the accompanying research, the aspects discussed should be carefully observed and evaluated. This concerns older persons' roles and task profiles in online communities, the development of empowerment strategies (perhaps by comparing peer-to-peer approaches with intergenerational settings), the taking into account of older persons' needs, and the changes in content and (conflict) structures and cultures in online communities resulting from older persons' increased engagement.

In the course of research projects, older persons should be involved personally, e.g. through discussions in focus groups or direct questioning. This demand is already being met by using the approach of action research (SP 4).

The exchange of information within the consortium and the research communities as well as with the advisory and evaluation board and the publication of the handbook, are important existing channels of dissemination. In addition, the following dissemination channels were suggested: create start-ups, encourage commercial stakeholders to address elderly needs, use facebook or other social media, organize exchanges, conferences, and events, set up help lines.

Consequences for the further course of the project: Prioritization Criteria

In order to implement the main recommendation, a discussion about prioritization of further project activities was started. The TAO Steering Board mandated the Management Board to agree on clear criteria according to which future project activities are to be *prioritized* in order to focus the efforts of the project team increasingly on the project's main objectives and intended outputs. This especially concerns the area of Action Research where demands tend to be high and resources scarce, while the Description of Work leaves quite a lot of room for interpretation about what the concrete activities are supposed to be.

The Management Board suggested that the prioritization of activities take place on the basis of a checklist with a set of criteria that an activity "must" fulfill or "should" fulfill, respectively, in order to be carried out as part of the project TAO. In order to allow everybody to participate, the project partners were consulted by means of an online survey.

Results show one "must have" and an additional six "should have" criteria.

Topic 1: Challenges of the Involvement of Senior Volunteers

Question 1.1: How can older persons be introduced to online communities and how can they be made aware of the relevance of online communities for their personal age(ing)?

Some of the challenges:

- Many older persons do not use online communities because they consider them to be irrelevant for their own lives.
- An online community is relevant to an older person's life if it helps to fulfill a certain desire, is in line with personal beliefs and values and serves to attain goals and plans.
- Some "young-old" persons have the image of an online community as being useful only for socially disintegrated, immobile, "old-old" persons.
- The most promising method of integrating older persons into an online community is through attractive topics of interest. The benefit derived from communicating about the relevant topic must outweigh the cost of participation.
- The involvement of (senior) volunteers in terms of 'Seniors for Seniors' (peer to peer) could be a critical success factor in activating and integrating older persons

1. Target groups

Focus on essential and relevant target groups. Clearly prioritize strategies and activities.

The broadness of current (and past) activities carries a possible risk of addressing too many different target groups. A connection was made to the points concerning the relevance of online communities and the further development of strategies for involvement, namely that arguments for relevance and strategies of involvement must be more carefully tailored to specific target groups.

2. Arguing the relevance of online communities

Compile a catalogue of arguments for the TAO handbook.

Arguments must *be concrete, use vivid examples and demonstrate specific interests* (i.e. communication with younger generation, money/profit, hobbies/sport, use of "complex" applications, self-help groups, medical care etc.).

The handbook should mainly contain concrete case studies so that the use of online communities can be demonstrated with particular examples.

Apart from the general imperative „participation in society“ and „stay modern/up to date“, the importance of highlighting the “social” as well as establishing a connection between online and offline was discussed. For example: a club of hikers who meet regularly to go hiking. These hikers could then find a group in an online community (i.e. facebook) in order to better connect/coordinate their “of-line” interests.

3. Strategies

- 1) Start off with offline groups and involve them in the online world using their interests and needs as a focus point.
- 2) Develop courses tailored to facebook and elaborate possibilities of usage as a platform of entry.

Look for offline groups and guide them to the internet according to their own needs/interests. This strategy is applied successfully in the project "Silberwissen" with regard to a group of municipal chroniclers.

The principle of role models, bridge builders and multipliers should be elaborated in the framework of the study on volunteers and be tested as a potential cross-sectional principle of the TAO project. Projects involving older and younger persons should be explicitly carried out in the framework of TAO since constellations of old-young can be a special motivational factor for older persons (both in the case of one's own grandchildren as concerning other children/adolescents).

Work more strongly with examples/role models and use multipliers and bridge builders. In the narrower circle of the family, grandchildren can provide special access, which is also true for school students who introduce older persons to the world of new media in the framework of specific "mentoring" projects (see www.compisternli.ch).

4. Research

Make the literature study available to the members of the evaluation & advisory board.

Overcoming obstacles like the often heard "I will do this when I am older" is a topic of theories in social psychology (general motivation).

5. TAO Project Development

Do not overcharge project: develop a prioritization of current and planned activities.

The members of the evaluation & advisory board warn against keeping activities as broad as they are now because otherwise the project will be overcharged and the actual research questions concerning the use of online communities and online collaboration might not be attended to sufficiently.

Target groups, strategies and activities need to be questioned with regard to the main goals of the TAO project.

Question 1.2: Which implications can the involvement of (senior) volunteers have for on-line communities as organizations (asset or drawback)?

Some of the challenges:

- Top-down structures and participation of volunteers are conflicting
- It is difficult to integrate volunteers and paid staff (!)
- The roles, functions and responsibilities of paid staff and volunteers must be transparent and clear
- To integrate seniors as volunteers has an impact on the organizational development
- The inclusion of older persons can improve the culture of online communities and help to adopt principles of transparency and tolerance for newcomers

1. New Roles

Establish new roles: seniors as community managers with control and supervisory function.

The example of facebook was mentioned frequently: children are increasingly present on facebook and they often count their own parents and grandparents among their “friends”. Grandparents could take on a kind of control and oversight role for their own grandchildren. Thus, members/users of a community or online platform, respectively, could solve problems by themselves without having to use administrative resources (control persons/rules etc.).

2. Empowerment

Strengthen the self-confidence of older members/users.

Peer groups can have an empowerment effect in online communities (e.g. through solidarity). In such a case, older persons are encouraged to advocate their interests with self determination and personal responsibility.

3. Needs

Perceive older persons’ interests and relate better to authors’ needs.

The real needs of older persons with regard to online communities need to be taken into account. This is the best way to establish trust.

4. Content

Perceived consequence: the focus of articles will change.

The focus of author-created content will change through the increased involvement of older adults. New topics will be added and (older) age-specific perspectives included.

5. Culture

Don’t expect a substantial change of the (communicative) culture: Moderators can help.

In the course of the discussion, the hope that older persons in general might have a better culture of conflict and a more adequate way of interacting in online communities was quickly dispersed. Using the example of Seniorweb NL (“Older adults fight just as often as do younger ones”) it became clear that older persons can also show a high readiness for conflict and escalations can quickly become a reality. Seniorweb NL therefore uses special moderators who try to propagate a better culture and an adequate way of interaction in the community.

Topic 2: Promising Strategies and Methods for Research in the TAO Project

Question 2.1: How scientific should strategies and methods be? Which are the challenges of mixed methods?

Some of the challenges:

- Comprehensive and in-depth vs. more general but wide-reaching methods
- Longitudinal vs. cross-sectional strategies; questionnaires vs. Observation
- Participatory approaches in action research and objectivity of observations
- Dynamics of action research: conflicting priorities in practitioners' and researchers' decision making within the research process
- Different understanding of quality criteria from all stakeholders' perspectives (i.e. matching methodological aspects from a scientific approach (validity, reliability, objectivity) with practice-oriented necessities of our action research activities)

→ This aspect was not discussed in detail because the discussions focused on the other questions (scope and outcomes).

1. Outcome of research and activities:

Avoid getting lost in the multitude of possible issues: focus on business models
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It was highly recommended to focus our activities and research on clearly defined objectives. One aspect was stressed: focus on business models practiced by actors in the field:

Activities to help older people to use the Internet are widespread. It is of utmost importance for TAO to define, at an early point, which activities and actors are most promising to examine and to learn from. TAO should primarily be able to provide guidelines and best practice examples for actors in the field of Internet usage by people aged 50 plus.

In order to facilitate and increase the uptake of the recommendations provided by TAO at the end of the project period, emphasis should be laid on business models, as approaches to help older people to use the Internet will only be effective and sustainable if the actors providing these opportunities generate revenues that at least cover their costs (e.g. for facilities, hardware, software, people etc.).

The points mentioned above will be taken into account in particular for the context analysis. Survey results as well as input from other sub-projects and from the community partners will be used in order to identify those aspects that turn out to be most relevant with regard to the activation goals of TAO and the triple win objectives of the project.

Question 2.2: Which should be the most informative outcomes for the evaluation of the TAO project activities?

Some of the challenges:

- Importance of psycho-social factors
- The factor “time” for the development of measurable effects

1. Internet Participation

Look at factors that influence and help to explain people’s internet behavior.

It would be misleading to consider “seniors” or “generation 50 plus” as a homogeneous group. People in this age group are characterized by high intra- and inter-individual variability, amongst others, in their motivations and likeliness to use ICT, which might change over the life-course. These factors could be, for instance, market entry points like the purchase of the first computer or a person’s reason to start using the internet.

The factors influencing the target groups’ internet behavior might not always relate to age, therefore counter-intuitive thinking appears as a useful method to capture factors that would escape the researchers’ attention if they only looked at age. For instance, gender issues (one EB member reported that women often like to avoid becoming a burden for their family members when they grow old and therefore they may tend to use online caring services) or family patterns (e.g. children move away and this requires new ways to communicate) could play a role in this regard.

These points aim largely at qualitative aspects that motivate and explain internet usage and behavior patterns of the target groups of TAO. We capture these aspects in two ways: The surveys will give us first insights into the role of the internet for the social situation of the persons under scrutiny. While these insights will remain relatively superficial (due to the characteristics and limitations of surveys as a research instrument), deeper insights in these aspects will be gained from case studies that will be conducted in the course of the context and impact analysis.

2. Handbook

Include only practice-proven and successful strategies and models.

Factors that have caused changes in the behavior of the persons we examine should be identified in order to capture typical dynamics of internet usage that may be helpful for the TAO handbook. For the handbook this implies that the conditions under which these strategies and practices have been developed must be known in order to also identify possible limitations of their transferability.

Topic 3: Prerequisites for Successful Know-How Transfer

Question 3.1: What are the prerequisites and the most efficient measures to ensure an effective know-how transfer within the TAO consortium?

Some of the challenges:

- How to enhance the know-how transfer from research partners to community partners (Senior-web / Wikimedia)?
- How to enhance the know-how transfer and exchange of experiences among the community partners?
- How to aggregate the inputs from researchers and practitioners from various fields and methodological backgrounds into a handbook providing guidance to community operators and/or on-line communities?

1. Know-how Transfer

Know-how transfer within the consortium and beyond the project should go hand in hand.

There should be an integrated approach to transferring know-how. Innovation management should be embedded in a multi-stakeholder approach: researchers, practitioners, and end users need to be part of the innovating team from the outset to the end. A systematic approach in several distinct phases is suggested: creativity phase, planning phase, implementation phase and market introduction. The thinking needs to be “outside-in”, starting from the user perspective, and practice oriented.

2. Impact of the TAO Results

Chose objects that focus on persistent problems.

In order for the project to have a sustainable impact, the consortium needs to choose its objectives carefully – the focus should be on problems that tend to be persistent over time (and not on problems that will disappear). In order to increase the chances that innovations will be taken up on a broader scale, there should be business ideas aiming at reaching general societal objectives and focusing only on high potential ideas.

Question 3.2: What are the most promising approaches to spread the know-how and best practices generated by the project TAO so as to maximize its impact both in the participating countries and in other European countries? What are the success factors?

Some of the challenges / questions:

- How to design the handbook in order to increase the chances of take-up? How to introduce it in the “market” and/or in the relevant communities in order to maximize its acceptance?
- Where to set the priorities in spreading know-how and best practices generated within the project?
- In what ways could the members of the Advisory and Evaluation Board be of help to spread the know-how and best practices generated by the project?

1. Exchange within the Consortium (and beyond)

Develop a common language among all stakeholders and try to reach converging perspectives.

The exchange within the consortium should be fostered in order to gain ever more user-centered insights. Exchange is facilitated if the partners have the same goals or at least a shared vision. We should learn from multi-stakeholder approaches: Choose a bottom-up approach, ask the field workers what they need for their practical everyday work, set up a helpline, introduce practical models. Make use of a seniors’ advisory council.

There should also be structured and co-ordinated exchange among community partners and with the Evaluation Board in form of an expert network. Face to face meetings and online exchanges should be combined. An online repository or intranet may be used to keep track of common documents. Facebook and other social media should be used to support the exchange. Research communities may be linked through mailing lists.

2. Handbook

The handbook needs to be designed according to the users’ needs.

The handbook should be designed to serve as a living knowledge base in the form of a digital rolling document (or as a handbook complemented by a database). It needs to provide fast access entry points, where people can quickly find what they are looking for, and read on if they like to.

It should comprise descriptions of success cases and best practice examples. For this purpose, past and ongoing experiences should be systematically gathered and analyzed. In order to facilitate the production of the handbook, common criteria should be set for the content. The language should be as simple as possible; authors should be aware that technical language / computer language may be an obstacle for readers.

3. Evaluation and Advisory Board

The Evaluation and Advisory Board should comprise researchers, practitioners, and end users.

Board members may spread the word and inform about the project over specialized channels and within their own networks. For that purpose, management summaries of project results should be provided (max. 1-2 pages) on a regular basis.

Advisory and Evaluation Board members may contribute their expertise to the project. In order to keep the “conversation” with the Advisory and Evaluation Board going, it is important that the Management Board let the Advisory and Evaluation Board know which suggestions were put into practice, and which ones were dropped; indicate the reasons to facilitate the dialogue.

4. Start-ups / Businesses / Non-profit ventures

Come up with business ideas at an early stage of the project.

Know-how and technology transfer often takes place through start-ups. Make business plans, design business models. Ensure the transfer of know-how to its potential users. Provide arguments to raise commercial interests. Show non-profit ventures how to achieve sustainability in providing a social benefit.

Implementation of Recommendations: Prioritization Criteria

The members of the research team as well as community partner representatives were asked to evaluate the criteria on a Likert scale, ranging from 1 (=must have) to 5 (=must not have). Eight persons participated in the survey (6 researchers; 2 community partner representatives). The table below shows the average rankings for the different criteria.

Criteria	Average
Criterion 1: The activity is directed at active participation of 50+ in online communities and/or online social networks	1.00
Criterion 5: There is a particular focus on creativity and innovation	2.13
Criterion 4: A real demand has been demonstrated (user centered approach, bottom-up initiative)	2.13
Criterion 2: There is an explicit demand and strong implication from the side of a practice partner	2.13
Criterion 9: The activity has a high multiplication potential (successful pilot implementation, plausible business model)	2.25
Criterion 6: The activity is methodologically useful for the production of the handbook	2.25
Criterion 10: The activity is useful in view of the internationalization and/or broad propagation of best practices beyond the consortium	2.38
Criterion 3: There is a particular focus on and readiness for know-how transfer (between partners or beyond the consortium)	2.50
Criterion 8: The effectiveness of the activity is supported by a systemic impact analysis	2.63
Criterion 7: The activity is useful in generating additional financial revenues	2.88
Criterion 11: There are important synergies between partners, and partners have demonstrated their readiness to exploit them	3.14

There is one “must” criterion:

All activities to be accompanied by action research must be directed at active participation of 50+ in online communities and/or online social networks (score +1 required).

There are six “should” criteria:

- There is a particular focus on creativity and innovation
- A real demand has been demonstrated (user centered approach, bottom-up initiative)
- There is an explicit demand and strong implication from the side of a practice partner
- The activity has a high multiplication potential (successful pilot implementation, plausible business model)
- The activity is methodologically useful for the production of the handbook
- There is a particular focus on and readiness for know-how transfer (between partners or beyond the consortium)

All activities to be accompanied by action research should fulfill these criteria. If they do not, appropriate measures should be taken to improve their score. To start with, an activity should reach at least a score of “+2” for all the “should” criteria combined. The value can be adapted by the Management Board according to the scarcity of project resources.

The prioritization criteria shall be re-evaluated next year in a similar process.

Contributing partners:



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