

TAO Project Deliverable D 6.2a

## Cover-Report

### Of the 1st Meeting of the Evaluation and Advisory Board

**Stefanie Becker**

Berne University of Applied Sciences

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Contributor(s):	Contribution
Stefanie Becker (BUAS)	
All subproject leaders (BUAS, UM Merit, ZAWiW)	Short reports

Quality Assurance	
Reviewers	Stijn Bannier (UM Merit)
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## **Executive Summary**

This report will give a short overview over the aims and purposes of the TAO project in order to shortly introduce it to the members of the Evaluation and Advisory Board. It serves also as a cover-report for the Evaluation and Advisory Board and aims to inform about the main results of the first year of project work. Therefore the report compiles and highlights of result of the different activities within the sub-projects. The results were summed up and evaluation questions were added which will serve as guidelines for the first workshop held with the Evaluation and Advisory Board in September 2011.

Also the evaluation mandate will be explained.

# 1 Introduction

## 1.1 Overview of the Deliverable

This report will give a short overview over the project's aims and purposes. The evaluation mandate will be explained in order to provide a guideline for reading the following highlights of result of the different activities during the first year of project work most effectively.

This report and the questions asked will be the basis for the discussions on our first meeting of the Evaluation & Advisory Board on the 16<sup>th</sup> of September in Berne.

### 1.1.1 The TAO Project

The TAO project aims at facilitating and promoting access of elderly people to online social communities and online collaboration projects. Providing the target group with new possibilities for social interaction and participation focuses at bridging the “digital gap” and attempts additionally to harness the growing reservoir of potentially active elderly people to promote social activity and collaboration in online communities.

In cooperation with existing providers of online communities the project is developing adequate tools and methods to attract more elderly people. TAO aims at setting off a “community pull” to encourage elderly people to engage in social interactions on the internet.

Hereby the project's **main focus** is on two types of online communities in different countries:

1. elderly-oriented seniors' communities (such as Seniorweb Switzerland and SeniorWeb.NL)
2. Wikimedia communities in various countries, which in general have a mixed target audience, but so far have mainly been dominated by young unmarried men.

This double focus and international orientation is motivated by the willingness to leverage existing synergies in terms of knowhow-sharing and audience-targeting between the two types of communities and between similar communities across borders.

The two **main challenges** with regard to promoting participation of elderly people in online communities to be addressed by the project are:

1. Development of effective methods to encourage elderly people to take an active part in online communities and to facilitate inter-generational integration in such communities  
→ Action Research
2. User interface and functionality design tailored to the special needs of elderly people (but also taking into account the needs of a wider community, inter-cultural differences, and the effectiveness of technically mediated social interactions) → Software Development

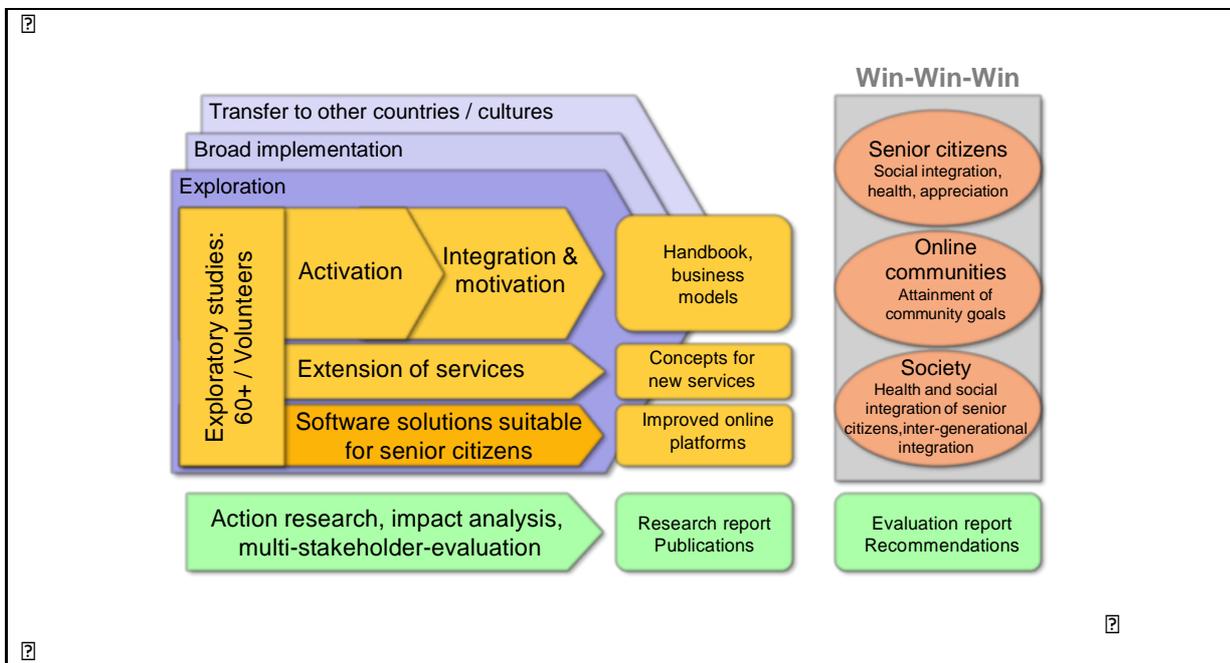
The project’s **foremost objective** is to bring about a win-win-win-situation (s. figure 1):

- Elderly people are expected to profit in terms of social capital and human capital (health and well-being, but also skills and knowledge), improved possibilities for online activities, and a larger array of online content which is targeted at their needs.
- Existing online communities are expected to profit in terms of increased participation (leading to economies of scale allowing for the satisfaction of “niche” interests) as well as in terms of a qualitative improvement of their “products” and/or their social interactions.
- And finally, society as a whole is to profit from improved social and human capital among seniors, from improved inter-generational relations as well as from the expected boost in “open” production and the creation of new opportunities for elderly people to put their knowledge and rich life experience to use.

The project’s **main outputs** supporting this objective will be:

1. A draft inventory of methods for “mobilisation” and “inclusion & motivation” and corresponding guidelines, which will be consolidated into a handbook for online community consultants.
2. Improved user inter-faces as well as prototypes for innovative approaches to supporting social interactions in online community settings.

**Figure 1: Overall project aims: win-win-win-situation**



The following partners are involved in the project:

Consortium Partners:

- Bern University of Applied Sciences: Department Business and Administration, Health, Social Work
- United Nations University / University Maastricht, UM-Merit
- University of Ulm, The Centre for General Scientific Continuing Education (in short ZAWiW)
- Seniorweb Switzerland
- SeniorWeb.NL
- Wikimedia Switzerland
- Wikimedia Germany
- Zeix AG
- Access for All Foundation
- MD Systems
- terzStiftung

Cooperating Partners:

- Coop
- Swisscom
- Pro Senectute

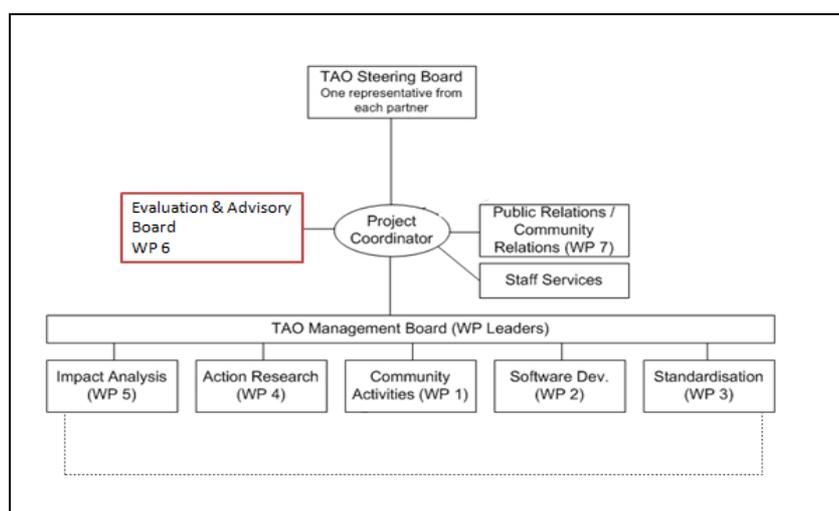
## 2 Evaluation and Advisory Board

The Evaluation and Advisory (E&A) Board consists of members with different scientific and practical background. We set value on a wide diversity of experiences of the E&A Board members because the formulation of adequate and efficient recommendations for the further project progress has to consider the perspective of all stakeholders involved. You will find the list of all members of the E&A Board in Annex 1.

### 2.1. Organisational Embedding and Evaluation Mandate

The E&A role is to refine and specify evaluation questions for the activities of the TAO project as well as to give recommendations in order to promote the project's progress towards the three dimensions of the win-win-win concept. Therefore the E&A Board has a strategic function within the organisational structure of TAO.

**Figure 2:** Organisational structure of TAO<sup>1</sup>



<sup>1</sup> WP will subsequently be referred to as SP=sub-project

**Perspectives and recommendations from all stakeholders concerning the following project objectives will be discussed on the forthcoming E&A Board meeting in Berne:**

Theoretical considerations:

- Opportunities and constraints of seniors' participation in online communities (SP6)
- Meaning of usability and impact (research and guidelines) (SP2, SP4, SP5)

Research strategy:

- Methodological approaches (SP5)
- Possible additional study focuses (SP5)

Sustainability:

- Prerequisites for successful knowledge transfer (SP1, SP4)
- Implementation and multiplication (SP1, SP4)
- National / international dissemination of results (SP1, SP4)

## **2.2. First Results of the Different Project Activities**

The following sections will present an overview over first results of the activities during our first project year. Each section is structured in the way that

- 1) an overview over current activities is provided
- 2) methods and results are described and
- 3) discussion points or working hypotheses are formulated

The latter aspect will be of particular interest for our first E&A Board meeting. Based on the points and hypotheses raised there, the discussion of the E&A Board meeting will be framed within the evaluation mandate described above.

All sub-project leaders and all colleagues of the TAO project thank you very much in advance for carefully reading through the information presented in this section and formulating important questions and comments from your experience in preparing for the meeting.

The following inputs will be presented:

- **SP 4:**            **Action Research: Exploratory study 60+**
- **SP1/4:**        **Community Activities/Action Research: Free Cruise on the Internet  
(Freie Fahrt ins Internet - FFI)**
- **SP 1/4:**        **Community Activities/Action Research: Wikimedia CH**
- **SP 1/4:**        **Community Activities/Action Research: Wiki Loves Monuments  
(CH)**
- **SP 1/4:**        **Community Activities/Action Research: Silberwissen**
- **SP 2/3:**        **Software Development and Standardization**

### **3. SP 4: Action Research: Exploratory study 60+**

#### **3.1. Elements of the exploratory study 60+**

The pre-study 60+ consists of two central elements, namely 1) a review of the literature on motivations of older persons to participate in online communities, on the potential benefits of that participation and on how older non-users of online communities can be reached, activated and integrated into online communities and 2) a combination of usability tests and semi-structured interviews with 18 participants with the purpose of identifying how online communities can be of use for the social integration of persons aged 60 to 75.

In this summary, we shall first report the results of the literature review before describing the method and findings of the usability tests and the semi-structured interviews.

#### **3.2. Literature Review**

##### *Defining online communities*

Preece (2001) defines online community as a virtual social space where people provide and receive information or support, where learning takes place, or where people find company. To Döring (2001, quoted from Schaffert & Wieden-Bischof, 2009, p. 11) an online community is an alliance of people with common interests who exchange information and build contacts on a regular basis and with a certain reliability [our translation].

Schaffert & Wieden-Bischof (2009) propose that an online community consists of persons with common interests who use the internet and other communication technologies for regular exchange and/or to jointly develop content. They thereby develop strong mutual attachments and experience themselves as belonging together (p. 12) [my translation].

Online communities can be distinguished – at least to a certain extent – according to their function. The definition by Preece (2001) mentioned above proposes three different functional ends of online communities, namely exchange of information and support (communities of interest, communities of practice), learning (communities of knowledge, communities of practice), and social interaction (communities of relationship; Hagel & Armstrong, 1997; Bürbaumer & Mellacher, 2009; Wenger et al., 2002).

##### *Community members' motivations*

Kollock (1999) sees most interventions in online communities as being driven by either egotistic or altruistic motives. Bishop (2007) proposes that one of the motivating aspects for community members is the opportunity to engage with others in participatory or collaborative behaviors that are in line with important personal desires (e.g. social, creative), plans, goals, values and beliefs.

His approach is an elaboration of earlier efforts to describe community members' motivations in terms of hierarchical needs theory (Maslow 1943, quoted from Bishop, 2007), which posits that if basic needs are met (e.g. a need for security) persons are motivated to show behaviors based on higher-order needs such as self-expression, affiliation, achievement or social recognition.

Active participation in an online community can also be viewed as learned behavior. In many cases, participation in an online-community will be reinforced positively by means of social rewards (Hoisl, Aigner & Miksch, 2007). An example of this would be an official and highly visible classification as active author, for instance on Wikipedia.

Online-communities are characterized by social exchange. Theories of social exchange usually explain the behavior of an individual in terms of costs and benefits (Butler, 2001). According to this theory, a person will participate actively when he or she assumes a high probability of a personal benefit. However, if the costs of such an active participation are considered too high, activity will be limited to the status of "lurker".

### *Barriers*

#### **Barriers in internet use**

It is important to note that the use of online-technologies does not only differ according to age but also according to gender, physical challenges, marital status and level of education. In the case of older persons these different factors frequently interact, resulting in new disadvantages. This is one of the reasons why the age-dependent digital divide proves to be very resistant to change (Godfrey & Johnson, 2008, p. 637).

Many older non-users cite fear of criminal activity, security risks, or obscene content as reasons for their non-use of the internet (Eastman & Iyer, 2004). The internet is often expected to be difficult to use (Lenhart et al., 2003) and to have little practical benefit for older persons (Morris, Goodman & Brading, 2007; Selwyn, Gorard, Furlong & Madden, 2003; Richardson, Zorn & Weaver, 2007). Moreover, non-users' social environment is often less encouraging of internet use than that of users (Schelling & Seifert, 2010).

Non-users of the internet are not only influenced by "hard" factors such as access and computer literacy but also by their perceptions of personal competence (Adams, Stubb & Woods, 2005) and negative emotional reactions to computers (Jung et al., 2010).

Functional impairments, which can be visual, motoric, auditory or cognitive, can also play an important role in the non-use of the internet by older persons (Kurniawan, King, Evans & Blenkhorn, 2006).

#### **Barriers in the use of online communities**

Most barriers in using online communities are rooted in problems with sociability or usability (De Souza & Preece, 2004). While sociability refers to the social interactions of the online community,

usability is concerned with the human-computer interface. Matzat (2010) sees three main problems of sociability in online communities, namely 1) a lack of trust, 2) free riding and 3) insufficient membership stability.

As Lehtinen, Näsänen & Sarvas (2009) point out, many older adults perceive the internet in general as a place that is unsuitable for sociality. With relation to Wikipedia, Schmidt, Glott & Ghosh (2010) identified the following two most important reasons for non-active use of Wikipedia in the age group 60+. 1) Most users are happy with just reading contributions. 2) Many users are convinced they do not have anything interesting to contribute.

### *Activation and integration of older persons in the context of online communities*

From the perspective of social psychology, participation in online communities can be seen as a behavior that is to be established through social persuasion. Social persuasion must address relevant attitudes, cognitions, and behaviors (Zimbardo & Leippe, 1991). Thus, a positive attitude towards online communities must be evoked first. Second, the relevant target groups must be informed about the advantages of participation in online communities. Finally, the addressed older persons must be capable of carrying out the desired behavior and be given the opportunity to practice the new behavior. It is important to note that a large number of older internet users are self-taught (Eastman & Iyer, 2004). Successful educational approaches often use settings that allow for mutual assistance and peer-mentoring. Choosing locations that are familiar to older persons will facilitate the linkage of technology with everyday experiences. Moreover, engaging older persons' existing social network in the learning process and showing how the internet and online communities relate to pre-existing topical interests have proved to be successful strategies (Godfrey & Johnson, 2008). Ideally, online communities should come across as personally useful, easy to use, and rewarding in the sense of providing the experience of self-efficacy (Adams, Stubbs & Woods, 2005).

### **3.3. Empirical Study: Use of Online Communities by 18 Participants Aged 60-76**

The following goals were relevant to the study:

- to identify different user-profiles;
- to recognize the dominant obstacles in using online communities;
- to examine what kind of social contacts participants desired and how online communities could respond to these desires;
- to discern differences in participants' use of online communities depending on the nature of their real-life social networks;
- to recognize how online communities could be more attractive to older persons.

#### *Sample*

A total of 18 persons (9 f, 9 m), aged 60 to 76, participated in the study.

Participants were recruited to form the following three groups consisting of six persons each: 1) Active users: persons who are current users of an online community. 2) Intenders: persons who are not active members of an online community but are interested in becoming an active member. 3) Hesitators: Persons who could imagine – on principle – becoming involved in an online community but who cannot see how they would benefit from doing so.

### *Method*

Participants were treated to one or two test sessions. Each test session was started and closed with a semi-standardized interview. The main part of the test session consisted of participants' working through a "scenario", a series of tasks, while being observed by two test administrators. Active users were either contributors to Wikipedia or they were active members of seniorweb.ch or facebook.com. Hesitators and intenders were asked to use two online-communities, one of which had to be Wikipedia, seniorweb.ch or facebook.com. They were free in choosing a second online community. Active users went through one test session, while intenders and hesitators were invited to a second test session four weeks after the first one. In addition, intenders and hesitators were questioned by telephone interview four weeks after their second test session.

### *Results*

While data analysis is still in progress, some preliminary results can be reported. Participants from all three groups – i.e. even active users – experienced considerable difficulty in working through the scenarios presented. However, virtually none of the intenders and hesitators considered usability problems as being decisive for use or non-use of the community. Rather, a tendency towards hypothetical narratives could be observed. Examples of these narratives are "Online communities are a good idea. But they just weren't made for me." or "Maybe later in life, when I won't be able to go outside anymore, I'll become a member of an online community." Only in those cases when there was an almost perfect match between the purpose of the online community and a participant's topical interests (e.g. travel writing) was there an authentic commitment to continued use and active contribution. In terms of the preferred nature of social contacts there was a clear preference for engaging in online communication with persons one already knows. Only a small minority of participants were interested in making new contacts. Concerning data protection policies most participants stressed the user's personal responsibility when sharing private information.

### **3.4. Discussion points**

- Participation in an online community can fulfill important needs and desires (e.g. a need for self-expression, a need for affiliation, creative desires).
- Many older persons do not use online communities because they consider them to be irrelevant for their own lives. Thus, one of the main challenges of integrating older users into

online communities is to demonstrate personal relevance of the internet and the online community.

- An online community is relevant to an older person's life if it helps fulfill a certain desire (e.g. being creative), is in line with personal beliefs and values (e.g. interacting with others is a good thing) and serves to attain goals and plans (e.g. this online community helps me plan my trip to Asia).
- Some "young-old" persons have the image of an online community as being useful only for socially disintegrated, immobile, "old-old" persons. Thus, they find online communities unattractive because they consider themselves dynamic, youthful and perfectly capable of real-life social contacts.
- 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.
- A majority of older users of online communities have never taken a computer or internet class. This raises questions about the effectiveness of internet classes.
- It would be more efficient to include older persons in the design of online communities and internet sites in general than to invest in educational measures and schooling.

## 4. SP1/4: Community Activities and Action Research: Free Cruise on the Internet (Freie Fahrt ins Internet - FFI)

### 4.1. Description of Activities and Roles

The project 'FFI – Freie Fahrt ins Internet' (Free Cruise on the Internet) aims at the improvement of older people's online skills. The partners of the public-private partnership are Berne University of Applied Sciences, Swisscom (the main telecom company in Switzerland), Coop (a wholesaler), seniorweb.ch, and ProSenectute (two non-profit organizations). The activities are heavily based on co-creation with volunteers. The activity-based workshops for teaching basic skills are developed and taught by a teaching team of senior citizens. The teaching environment is a café in a shopping mall in the city of Bern. Simultaneous to the courses we provide a Help Point, which aims at giving general internet support to senior citizens.

The project is organized according to the following organizational units and/or roles:

- **Steering Board:** Representatives of the different partners are defining the strategic roadmap. The members of the board are meeting every second month on average.
- **Project Manager:** One person has the operational lead of the project and is responsible for the planning and controlling of the human and financial resources.
- **Ambassadors:** Persons in this role are in charge of the Help Point and have the task to engage senior citizens to an active use of the internet and to give support outside of the courses.
- **Moderators:** For each workshop one person has the lead for the planning and implementation.
- **Assistants:** Each workshop has two assistants, as the focus is rather on learning-by-doing than learning-by-teaching.

From October 2010 to June 2011 we have worked through the following phases:

- **Ideation:** Based on the belief that involvement of the stakeholders leads to better solutions we have started with a broad discussion within the steering board and the group of volunteers.
- **Test:** Within a phase of three weeks in November 2010 we have validated the developed concepts in real life situations in the Wankdorf shopping mall.
- **Consolidation:** From February to May 2011 we were teaching 4 courses per week and providing a Help Point for 3 days per week.
- **Evaluation:** During the consolidation phase we were evaluating participants, volunteers and members of the steering board.

- **Multiplication:** In a next step the same concept will be implemented in two other shopping malls. And at a later time it is intended to transfer a similar workshop concept to retirement communities in the country.

## 4.2. Research Approach

The evaluation is based on the following research activities:

- 5 interviews with members of the steering board
- 12 observations of workshops/seminars
- 1 focus group with three workshop instructors (1,5h)
- 12 individual interviews with workshop instructors and workshop assistants (12 x 1h)
- 12 questionnaires about Freie Fahrt ins Internet, filled in by the workshop instructors and workshop assistants
- 92 questionnaires about the workshops/seminars, filled in by the participants immediately after attending the course
- 10 telephone interviews with participants about the effects of their workshop and seminar attendance, conducted circa one month after the workshop/seminar

## 4.3. Results

The main results of the evaluation can be summarized as follows:

### Participants:

- **Overall satisfaction:** FFI-courses are highly appreciated among the participants: most attendants are (very) satisfied and praise the open attitude of the course instructors and the way they interact with the participants.
- **Content:** The content was appropriate for most of the participants. In future FFI-courses, the participants would welcome 'social media' and the 'connection between mobile phone and internet' as new learning topics.
- **Level of expertise:** Participants suggest that the future FFI-communication should clearly indicate beforehand which level of expertise is recommended for each course. This would help to avoid the great differences in computer knowledge between the participants that sometimes disturbed the courses.
- **Expectations:** The male participants are somewhat less satisfied and their expectations are a somewhat less fulfilled. The current evaluation questionnaire could however not reveal the reasons for this. In any case, until these reasons are clarified, it would be useful to specifically ask for participants' expectations during registration and/or at the beginning of the course.

- **Sustainability:** A month after the course, most participants indicated not to be using their new knowledge at home. The new skills have clearly not become a routine yet. Although the participants claim to know “how it works”, the threshold to try it by themselves is still quite high –and the older the participant, the higher the threshold. Among some participants, there is a need for supervised practice-classes, in which they could freely experiment and refer to a tutor in case they have questions.

#### **Volunteers:**

- **Overall satisfaction:** The majority of the moderators, assistants and ambassadors perceive the first edition of FFI as a successful campaign. Most of them are willing to continue the collaboration in the next FFI edition. As they are not paid, they appreciate specific other forms of recognition of their work from the management.
- **Content:** The volunteers have developed the course materials themselves. Some of them felt over-challenged by this task. But at the end they agree that the process was useful and that they have produced reasonable results. Especially the mix of a small amount of theory and a lot of practical exercises is acclaimed.
- **Level of expertise:** The disperse level of expertise of the participants leads to difficulties in the courses. Proposed solutions are: Make the prerequisites of the courses more explicit in the advertising; plan enough time for the assisted exercises; provide different levels of complexity; provide a glossary of internet terminology.
- **Organization:** The volunteers ask for a continuation of the chosen path with a transparent flow of communication from the management and the steering board to the actors at the front.
- **Sustainability:** The volunteers wish the development of measures to ensure the sustainability of FFI courses. For example the creation of a strong knowledge management system to share expertise would greatly facilitate their efforts. They also agree to apply the same workshop concept in other learning environments.

#### **4.4. Discussion Points**

Based on our experience the **main critical success factors** can be summarized as follows:

#### **Volunteers:**

- ‘Seniors for Seniors’ as the vision and motto
- Enthusiasm of the volunteers
- Group activities (co-design, co-creation) for the development

**Teaching:**

- Learner-centered teaching with a lot of hands-on activities
- Guiding the learning process more by asking than by telling
- Handouts with simple, self-explanatory instructions and exercises

**Organization:**

- Committed sponsors
- Low-threshold location
- Publications as booster for publicity

## **5. SP 1/4: Community Activities and Action Research: Wikimedia CH**

### **5.1. Description of Activities**

In order to help Seniorweb CH out financially and to spur closer cooperation between the two organizations, Wikimedia CH paid the Seniorweb CH project manager from May to September 2010 in order to allow him to raise money for his own organization and to develop common activities with Wikimedia CH. During this period, several common meetings were organized, during which the Seniorweb CH project manager was able to get in touch with different members of the Wikimedia CH community. During that time the Seniorweb CH project manager was also busy with the preparation of the pilot project “Free Cruise on the Internet” for which he had the operative responsibility. Apart from that, there was little activity on behalf of Wikimedia CH. First initiatives to mobilize more Wikimedia CH members lacked the necessary follow-through, and cooperation between Wikimedia CH and Seniorweb CH was overshadowed by a conflict which broke out between their two project managers in September 2010.

Wikimedia CH participated in the pilot project “Free Cruise on the Internet” at the Wankdorf Center (December 2010 – May 2011) with a rather low degree of implication; its main contribution consisted in offering a Wikipedia introductory course, which was successful (booked out all four times it was scheduled).

In March 2011, after a longer clarification period, the Wikimedia CH project manager left the project TAO – mainly because he was not able to live up to the expectations neither of the TAO Management Board nor of the Wikimedia CH Board. One of the Wikimedia CH Board members has since taken over the coordination task at Wikimedia CH on an interim basis.

In spring 2011 Wikimedia CH decided that it will carry out a “Wiki Loves Monuments” contest in summer/fall 2011. The project is coordinated by a highly motivated and active Wikimedian and seems to be on a very good track. Wikimedia CH and Seniorweb CH have seized the occasion to reinforce their co-operation by involving Seniorweb volunteers in some organizational and communication tasks for the contest and by explicitly inviting them to take part in the contest.

In mid-June 2011 Wikimedia CH and Seniorweb CH both took place in a fair for seniors in the French speaking part of Switzerland. They joined their stands in order to start presenting themselves in common and to foster the exchange among their volunteers. In fall 2011 and in 2012, the two organizations plan to carry out common courses at Senior Universities in the French speaking part of Switzerland. In the future, their common activities will increasingly be carried out under the label “Free Cruise on the Internet”.

## 5.2. Research/Consulting Approaches

So far, the consulting activities with regard to Wikimedia CH management have focused on the following aspects:

- Encouraging and sustaining cooperation between Wikimedia CH and Seniorweb CH (and “Treasure of Switzerland”) (ongoing)
- Defining an action portfolio for Wikimedia CH (November 2010; June 2011)
- Clarifying the role of the Wikimedia CH project manager (November 2010 – March 2011)
- Defining a roadmap for the transition period after the project manager dropped out (March 2011)
- Analysis of the status quo (after talks with various Wikimedia CH members) and proposal for a restructuring of internal communication (April/May 2011)

The status quo analysis has led to the identification of the following challenges:

- Organizing collective action in teams which comprise more than 3-5 people is a great challenge. Smaller teams are functioning well, and there is the will power to move forward with various projects.
- Potential synergies often remain unused and people are frustrated because of a lack of shared vision.
- It has been difficult to integrate new volunteers and to manage paid staff due to insufficient management structures (planning, reporting, task management, definition of roles and responsibilities). There are, however volunteers who would like to contribute to the different projects, and there also seem to be people aspiring to paid jobs.
- Communicating across linguistic borders poses some difficulties; linguistic and cultural differences are a source of miscommunication and a projection canvas for conflicts.
- The Board and the Executive Team have difficulties to organize regular real life meetings. Under these circumstances, reaching a shared vision, integrating the association’s various activities, creating adequate management structures, and mediating inter-cultural communication is even bigger a challenge. There is however a strong will among some of the Board and Executive Team members to improve the organizational maturity.

The approach suggested to Wikimedia CH to improve internal communication involves:

- Organizing the work of the association (board, organizational units, projects) in small groups of 3-5 people according to the Brainspace method, which is a method to organize collaboration of larger groups, based on regular group meetings (online or offline) and systematic documentation of the results of those group meetings;

- Establishing systematic planning and reporting for all the projects/areas of strategic relevance;
- Establishing dedicated working groups for strategically important fields of activities, such as “Public Relations”, “Human Resources”, “Organizational Development”.

The implementation of the approach would start with the most active project (Wiki Loves Monuments). So far, a few small steps towards implementation have been taken by the Wiki Loves Monuments project manager; BUAS presently lacks resources to accompany implementation in a proactive manner.

### **5.3. (Expected) Results**

There is a strong will for cooperation between Seniorweb CH and Wikimedia CH even though cooperation has been difficult at moments and a bit slow to take shape at the outset. We expect cooperation to be beneficial for both partners.

Thanks to the suggested approach for improving internal communication, we expect the following results:

- Action in smaller groups will be supported; members who want to contribute their talents and their time will be empowered: so we expect to see more activities in small groups.
- Overall coordination will be improved; reaching a shared vision will be facilitated; the necessary structures will be created to guide new volunteers and to manage paid staff and contractors: so we expect more large scale collaboration among volunteers and less conflicts which are due to ill-defined roles and procedures.
- The importance of cultural and linguistic barriers will be reduced.
- The organization will stop relying on the Board alone to solve its most pressing problems.

We also expect that this approach will allow us to gather sufficient input for a systemic impact analysis of the Wikimedia CH organization – even if we are not able to work with the Board on a regular basis.

### **5.4. Working Hypotheses**

- Close cooperation with Seniorweb CH is the key to Wikimedia CH's success with regard to TAO goals.
- Organizational development is a prerequisite for reaching the TAO related goals (getting older people to actively contribute to the Wikipedia and its sister projects).
- The main challenges regarding organizational development are reaching a shared vision and organizing collective action. They can best be met by improving communication. The suggested method is a good way to do so.

- Organizational development of Wikimedia CH is most likely to take place around concrete projects and co-operations, such as Wiki Loves Monuments or the co-operation with cultural institutions.

## 6. SP 1/4: Community Activities and Action Research: Wiki Loves Monuments (Switzerland)

### 6.1. Description of Activities



WIKI loves  
monuments

“Wiki Loves Monuments” ([www.wikilovesmonuments.ch](http://www.wikilovesmonuments.ch)) is a national photo contest running from July to September 2011. The Swiss Wikimedia chapter organizes the contest together with various partners from the cultural sector. The goal of the contest is to gather freely usable photos of officially recognized Swiss cultural heritage sites. Wikimedia CH takes the contest as an occasion to reinforce its cooperation with other partners from the TAO project, such as Seniorweb CH, the Bern University of Applied Sciences, Coop, and Pro Senectute. Furthermore, from the point of view of Wikimedia CH “Wiki Loves Monuments” is a charm offensive at the address of the Swiss population, in order to raise public awareness and support for its main goal – the promotion of free access to knowledge – and to demonstrate how easy it is to contribute to Wikimedia projects. A “Wiki Loves Monuments” photo contest was first carried out by Wikimedia Netherlands in 2010. Due to its great success, it will be carried out in 15 European countries in parallel in 2011.

Seniorweb CH volunteers are expected to contribute to “Wiki Loves Monuments” by supporting the PR activities (organization of local events, information of the local and regional media, and information of their own online community), by helping out with some organizational work (award show), and by simply taking part in the contest. Moreover, Seniorweb CH and Wikimedia CH will take the contest as an occasion to further develop their course offerings, especially in the area of photo editing and using photos in connection of various online communities, including Wikimedia Commons.

In contrast to “Free Cruise on the Internet”, where Seniorweb CH volunteers organize in quite large groups (ca. 25 people per site), they are expected to organize in smaller groups (2-3 volunteers) to support the contest.

### Treasure of Switzerland



„Treasure of Switzerland“ is a participatory project which brings younger and older people together and invites the Swiss population to embark on a “treasure hunt”. The search for the “Treasure of Switzerland” will take place in form of various sub-projects which are carried out by different organizations, which collect contributions from the population on their online platforms. Topics are inter-generational relations, talents of the Swiss population, oral history, etc. The project will be launched at the Public Award Show of the “Wiki Loves Monuments” contest in November 2011. “Wiki Loves Monuments” will serve as an exemplary sub-project to illustrate the procedure to be used for

“Treasure of Switzerland”. Other sub-projects will be elaborated together with partner organizations in summer/fall 2011. They will be started individually in 2012 and will all culminate in a common multi-media show in front of the Swiss Parliamentary Building in fall 2012.

With the project “Treasure of Switzerland” we pursue four main objectives:

- Make e-participation palpable to a wider audience, in a way that even offliners are able to contribute and to experience its multiplication effects.
- Foster the dialogue about the use of information technologies in private, in society and in politics both across linguistic and generational borders.
- Create a platform, made up of pictures and stories, through which the ideas of digital sustainability and e-inclusion can be communicated to a broader public in an efficient manner.
- Contribute to social cohesion in Switzerland by encouraging the dialogue about common experiences and values.

„Treasure of Switzerland“ will be carried out by an association the board of which will be made up of Swiss parliamentarians. The operational implementation will take place under the lead of an artistic director who has successfully carried out larger participatory projects in the past.

## **6.2. Research/Consulting Approaches**

Back in fall 2009, we have discussed various approaches to getting older people to actively contribute to the Wikipedia and its sister projects. Thereby, two major approaches have crystallized:

- 1) Make a rather small selection of very capable people showing a high interest in becoming highly active contributors. Train them and assist them in their first steps as active contributors (the main challenge: devise a selection process up front which prevents Wikimedia from investing too much effort in people who will later drop out).
- 2) Communicate very broadly about possibilities to contribute. Offer very simple possibilities for beginners, which do not necessarily involve editing articles. Show the very wide range of possibilities to contribute; offer playful approaches for a start (the main challenges: ensure broad publicity; get people to contribute regularly and to actively seek information about how to go about it).

Wikimedia Germany tended towards the first approach, Wikimedia CH rather towards the second one. The two approaches are complementary.

So far, the efforts of the Bern University of Applied sciences have focused on gathering a team of professionals able to carry out a larger participatory project and to support our community partners in their organizational development, on establishing contacts to politicians, on fundraising, as well as on brokering co-operations between partner organizations.

The next step will consist in identifying aspects which we want to focus on in action research.

Apart from the activities of Wikimedia CH and Seniorweb CH, the project “Treasure of Switzerland” will be carried out as a spin-off project of the project TAO with separate funding.

### 6.3. (Expected) Results

From the 2011 activities we expect the following results (from a TAO perspective):

- Wikimedia CH and Seniorweb CH (and possibly Pro Senectute) enter a true cooperation, allowing them to benefit from each other’s strengths and to compensate for each other’s weaknesses.<sup>2</sup> Their members get more and more involved with each other.
- Wikimedia CH starts playing an active role within the TAO consortium again and finds a good way to address seniors.
- We manage to raise public awareness for e-inclusion, e-participation, and crowdsourcing issues.
- As a model project of “Treasure of Switzerland”, “Wiki Loves Monuments” helps jump-start a larger participatory project in 2012 dealing with e-inclusion, e-participation and inter-generational issues.
- Thanks to “Treasure of Switzerland” the community partners and the research team will benefit from external expertise in organizing larger participatory projects. This will also improve our organizational capacities with regard to spreading “Free Cruise on the Internet”.
- “Wiki Loves Monuments” will serve as an exemplary project to start tackling organizational problems at Wikimedia CH, enabling them to participate more actively in TAO in the future.
- Participation in “Treasure of Switzerland” will provide Seniorweb CH with good fundraising opportunities to fund further TAO-related activities.

### 6.4. Working Hypotheses

Working hypotheses regarding the 2011 activities comprise:

- For Wikimedia CH the “Wiki Loves Monuments” contest is a good occasion to get engaged with and to attract more seniors as active contributors. A lot of older people are interested in photography and cultural heritage; contributing photos is a low-threshold way for seniors to start actively contributing to Wikipedia, they will think it is fun.
- The contest will stimulate seniors’ interest in Wikimedia-related issues, giving way to new introductory courses, meetings or other forms of collaboration.
- Getting public attention will generally increase volunteers’ motivation to participate actively in common projects.

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<sup>2</sup> To give some examples to illustrate the case: Wikimedia CH is most prominently present in the French speaking part of Switzerland where Seniorweb is underrepresented. Seniorweb CH has serious funding problems, while it can quite easily mobilize volunteers; Wikimedia CH, on the other hand, has a harder time mobilizing volunteers for real-life activities, while funding is not a major problem.

- Sparking the organization of small groups of 2-5 people all over the country will enhance the overall organizational capacity of Seniorweb CH regarding the implementation of “Free Cruise on the Internet” and other projects.
- Many older people are interested in inter-generational exchange.
- Offering completely new types of volunteering opportunities does not reduce the volunteer engagement in existing activities (such as Free Cruise on the Internet; Seniorweb’s Online Magazine, etc.).
- Engaging in highly publicized activities of public utility will provide Seniorweb CH with an ideal platform to attract people’s attention to their own organization and its activities and to gain new members

## 7. SP 1/4: Community Activities and Action Research: Silver Knowledge (Silberwissen)

### 7.1. Description of Activities

The project Silberwissen is led by the association Wikimedia Deutschland e.V. in the framework of the AAL project TAO the Centre for General Scientific Continuing Education (ZAWiW) of Ulm University consults and supports Wikimedia scientifically in its coordination of the project Silberwissen. It does so mainly in the course of action research.

#### Starting point for Silberwissen

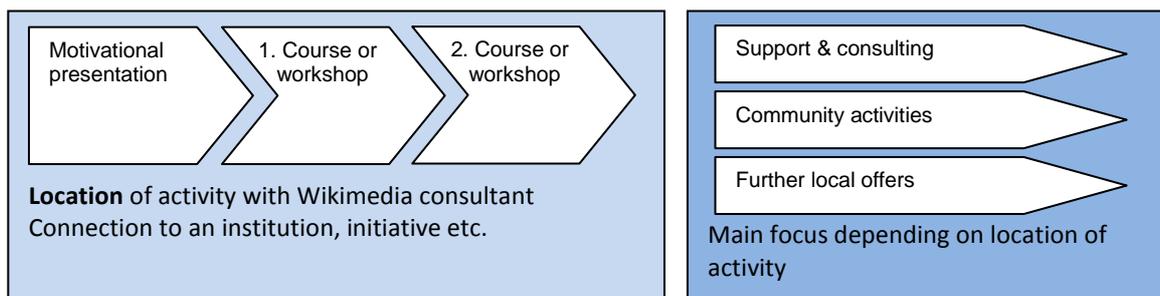
The international surveys of Wikipedia authors show that “age” is a very significant predictor of active contribution. Only 6.3% of Wikipedia authors are between 40 and 49 years of age, and people between 50 and 85 years – a span of more than three decades – make up only 5.2% of authors (Gosh, Glott 2010; <http://www.wikipediasurvey.org>).

One of the desired effects of having a greater number of seniors as active contributors to Wikipedia is the improvement of the quality of the free knowledge available in the online encyclopedia. The project’s focus is on the promotion of free knowledge for all generations. The objective can be operationalized as follows:

- To win over and activate older persons as Wikipedia authors.
- To coach and support Wikipedia authors at regular meetings, to take part in editorial groups, workshops, and the mentoring program.
- To find additional locations of activity in cooperation with institutions, initiatives and local educational bodies, and – if possible – establish permanent structures.
- To develop community activities ensuring a sustainable activation and integration of senior authors in the Wikipedia community.

### 7.2. Research Approach

As an initial stage of Wikipedia author training, interested seniors took part in a motivational presentation and a multi-part course or workshop at the different locations of activity. In selecting the locations a deliberate effort was made to choose cooperation partners that varied with regard to the type of institution, the range of offers, the main focus and target groups, and the priorities in the course of the project.



In the further course of the project seniors will continue to acquire competences and skills for the production of Wikipedia articles. This will be done at the respective locations by following an approach of small steps and sticking to a low-threshold communication. Apart from being trained as authors of original Wikipedia articles the activity options will also include new roles/tasks, e.g. the correction and amendment of existing articles (orthography and grammar), entering links to other sources and web pages, carrying out tasks of categorization as well as getting involved in related projects such as Wiki Commons and Wiki Sources etc.

One of the benefits of including different locations of activity with different target groups and strategies is that it allows for the identification of successful approaches to activation and integration. From the existing Wikipedia pool of volunteer consultants 20 to 25 persons will be recruited for the duration of the project. Each mentor is to coach a group of seniors in the course of the motivational presentation and the planned workshops. Continued online coaching will also be an option.

Obstacles and facilitating factors for the collaboration in Wikipedia: the most frequent answers of persons aged 60+ (Banner & Glott 2011)

Why don't you contribute to Wikipedia?	I would be much likelier to contribute if ...
I am happy just to read it; I don't need to write it <b>48,17%</b>	I knew there were specific topic areas that needed my help <b>34,90%</b>
I don't think I have enough information to contribute <b>44,20%</b>	It was clear to me that other people would benefit from my efforts <b>31,14%</b>
I don't know how <b>17,14%</b>	Someone would show me how to do it <b>14,42%</b>
I don't feel comfortable editing other peoples' work <b>14,31%</b>	I was confident my contributions would be valued and kept <b>12,75%</b>
I am not sufficiently comfortable with the technology <b>13,69%</b>	The technology was easier to use <b>7,10%</b>
I don't have time <b>10,66%</b>	I knew that other contributors would be welcoming and encouraging <b>6,90%</b>
Others are already doing it, there is no need for me <b>9,51%</b>	Other / don't know / don't want to say <b>35,74%</b>

### Hypotheses

(1) Older persons can contribute their professional and life experience as well as their more freely disposable time and are therefore particularly well suited to work as Wikipedia authors.

(2) To be able to contribute personal knowledge to Wikipedia is an important incentive and has a motivating effect. Do personal motivation and the satisfaction during active contribution (flow effect) play a special role for seniors?

(3) In working for Wikipedia older persons have the opportunity to establish new social contacts and to invest in personal networks. Thus, Wikipedia facilitates the participation in society and builds bridges between the generations.

(4) Wikipedia has a high prestige and generates a large amount of interest. However, recruiting persons for a sustained collaboration is very difficult. That is why the fraction of “lukers” (passive participators) is very large (Jakob Nielsen’s 90-9-1).

(5) The obstacles for older people to collaborate as senior authors are very difficult to overcome. Not only does active collaboration require competences on different levels but older persons also tend to set high standards for themselves. Both factors can easily lead to a mental overload.

(6) Wikipedia can be developed as a new post-professional field of activity. In doing so the role of volunteers needs to be outlined, the societal and – with regard to older persons – the individual importance of Wikipedia needs to be pointed out and the opportunities for seniors need to be further developed.

(7) Contributions to Wikipedia require considerable persistence, which will most likely be shown by people with a “sense of mission” and a sustainable interest in a specific subject such as local history, philately, ornithology etc.

### **Description of the supplementary research activities**

Together with Wikimedia Germany the ZAWiW carries out annual workshops of several days’ duration to foster the exchange of experience between consultants. This creates the foundation for the further collaborative development of materials, the qualification of new consultants and the development of new community activities. Special care is taken to ensure that the development of the project, the materials and the future strategy will be elaborated together with Wikimedia consultants and thus from within the Wikimedia community. Furthermore, the different locations of activity will also be offered the opportunity to exchange their experiences.

The locations of activity will be responsible for a project evaluation including a post-activity survey under the direction of ZAWiW. The results of the evaluation will be made available to ZAWiW as part of the research obligations in the AAL project TAO. Locations serving as typical examples will be met with more intense research activities and documented in an expanded way. Face-to-face and group interviews will be carried out with the responsible persons and participants. Prominent activities will be documented in written form and with photographs (also with other media, if applicable) and will be prepared for public relations and the TAO compendium.

### **7.3. Results**

So far, acquiring locations of activity has been no problem because of the high prestige of Wikipedia; the motivational presentations are well-attended, the follow-up workshops are popular. It is not clear yet, however, what workshop participants' success rate will be, i.e. how many participants will stay active in Wikipedia for a longer period.

The number of locations is to be multiplied from now until September 2013 (see objective above). This, however, requires a corresponding infrastructure on the part of Wikimedia. In addition, the locations need to be found and coached professionally so that they can meet the required standards of quality. The successful multiplication of the project implicates the recruitment of further Wikipedia consultants so that acquired locations are really attended to and do not have to wait too long for activities to start.

The TAO project's starting point is that the Internet can contribute to the broadening of the experiential and social realm of persons in the third age, that it can facilitate the use of sensible online propositions in the domain of health and that it can support the shaping of one's own life in the third age. While the social aspect of cooperation is an imminent feature of seniorweb.ch and seniorweb.nl and of other senior online communities (such as ViLE network, feierabend.com) it is more of a by-product in the case of Wikipedia. The Wikipedia community does not aim for social cooperation but creates meaning through the emergence of a "collective authorship".

The project Silberwissen is contested by certain parts of the Wikipedia community. It is not yet clear how this problem will be resolved by the community.

#### **Further steps in the project**

Key aspects of the project Silberwissen in 2012 will be:

- Finding new locations and Wikimedia consultants (multiplication).
- Further development of the complementary research activities for purposes of self-evaluation.
- Development of quality standards, cooperative development of materials and methodical-didactical tools for newly acquired consultants.
- Further diversification of task and roles at Wikipedia, promotion of related projects, especially Commons and Wiki Sources.
- Regular information of the Wikipedia community.
- Development of complementary community activities and of recommendations and instructions for future actions.

#### **7.4. Discussion Points**

- Will the project Silberwissen change the Wikipedia community? The Wikipedia community is characterized by a high density of rules and by a discussion culture of exclusion (e.g. the relevance debate). Can the project and the inclusion of older persons improve the prevailing culture of discussion and alleviate regulatory restrictions by adopting principles of transparency and tolerance for newcomers?
- Does older persons' collaboration in Wikipedia really contribute to an increased societal participation and an improved social integration? Are other online communities focusing on social cooperation better suited for older persons? Can this question be answered in such a global manner or are differences between individuals simply too large?
- What would happen if the project Silberwissen did not exist? Would older persons catch up in using and contributing to Wikipedia as is suggested by the increased rates of general internet use by older persons? Or will a "natural" integration of older persons into the Wikipedia community fail because "latecomers" tend to be excluded by the density of rules and by the prevalent social codes and will not be respected in their special needs and requirements?

## 8. SP 2/3: Software Development and Standardization

### 8.1. Description of Activities

Existing online community platforms often do not offer the best possible accessibility/usability experience for elderly users or new users in general: user interfaces are not always as clear and intuitive as they should be, functionalities are sometimes hard to understand at first sight, assistive functionalities for people with disabilities are missing, while help pages may be hard to find or badly structured.

Activities to improve usability and accessibility from a technical point of view focus on improving the software applications on which the Wikimedia Communities and the Seniorweb CH Community are running – MediaWiki and Drupal. The project partner “Access-for-All” (AfA) is a specialist in accessibility issues and certification, and focuses on accessibility aspects with respect to the Wikimedia Foundation (WMF), especially its flagship *Wikipedia* which is based on the *MediaWiki* platform. The project partner “MD Systems” (MD) acts as a main contributor and a maintainer of various Drupal modules, and focuses on usability issues with respect to the *Drupal* Open Source CMS, on which the seniorweb.ch community is running.

The Wikimedia Foundation (WMF) having carried out several projects to improve the user experience for average users of MediaWiki in recent years, the focus of SP 2/3 is on the particular needs of elderly users and of users with disabilities. The requirements gathered within the TAO project will be handed on to the Wikimedia Foundation which will coordinate the corresponding implementation.

In the case of Drupal, MD Systems, focuses on improving the usability of the software with a special focus on elderly people.

### 8.2. Description of Methods

The methodology is specific for each project partner due to their different competences. Both partners have strong skills in analysis and evaluation of web platforms. Additionally, MD has elaborate skills in implementing and deploying solutions to the Drupal platform. In the case of AfA, the results and recommendations will be handed over to the WMF/Wikimedia Germany subsequently, which leads the implementation process.

In the case of AfA, there is an initial analysis phase, where accessibility issues in Wikipedia are assessed. Subsequently, recommendations for improvement are handed over to WMF/Wikimedia Germany which evaluates the launch of implementation projects. In parallel, student theses are announced with focus on implementation issues. In case that implementation results will be available before the end of the TAO project, AfA will carry out a pre-post comparison concerning Wikipedia accessibility.

MD initially assesses the Drupal platform with focus on usability issues. The requirements are prioritized and are planned to be implemented and deployed. MD follows an iterative approach such that after each iteration the priorities will be reconsidered and probably adapted depending on the practicability of the solutions, and also depending on certain business constraints.

### **8.3. Results**

AfA has completed the accessibility study for the Wikipedia platform (June 30, 2011). A draft version of the report is available; the recommendations for improvement are under development. WMF/Wikimedia Germany (Pavel Richter) has been informed about the progress and has confirmed to consider implementing accessibility issues after evaluation of the report. (Reference: Goal D 2.1a in the Description of Work).

MD has completed the first iteration of the Drupal usability assessment. Usability issues have been identified and prioritized. The implementation of some usability aspects is ongoing respectively has already been completed for some issues. The implementation has been carried out by MD and by 2 student theses. There are related project documentations available:

- <http://www.md-systems.ch/blog/2011-02/projektabgabe-properties-fuer-drupal-7>
- <http://www.md-systems.ch/projekt/2011/diplomarbeit-fuer-drupal-linkmanagement>
- <http://www.md-systems.ch/projekt/2011/simplenews-linkchecker>

A consolidated report is expected by the end of the first iteration (M12) of Drupal accessibility optimization. (Reference: Goal D 2.1a in the Description of Work).

### **8.4. Further Information**

Project work concerning accessibility issues progresses fine, AfA is even slightly ahead the project planning. The same holds for the work on usability issues. Simply the report which has been expected in M6 is delayed (but a draft version exists already). In a recent subproject meeting it has been agreed that the reports M6 (requirements) and M12 (implementation) will be consolidated in one document.

The implementation of accessibility issues in Wikipedia and the subsequent pre-post comparison is depending on the launch of an implementation project by WMF. Depending on these decisions, AfA will either concentrate on the pre-post comparison, or on field manuals for authors and editorial staff.



Contributing Partners:

**Bern University of Applied Sciences**  
**University of Maastricht, MERIT**  
**University of Ulm, ZAWiW**



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