

TAO Project Deliverable D 4.3c

Handbook: Final version

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Jan-Mathis Schnurr (ZAWiW)	Handbook module “Open TAO Workshop”, “Problem-oriented access”, “Analytical framework for the evaluation of online communities”
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Karen Torben-Nielsen (BFH)	Handbook modules “Target Groups”, “Volunteers”
Meike Westerhaus (ZAWiW)	Text describing the Handbook, Handbook modules “Introduction”, “Volunteers”, ”Mutual benefits of volunteer work”, “Online Learning Activities”, ”Silver Knowledge” “Communities of Practice”
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Quality Assurance	
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Commented Summary of the Review (incl. corrective action / date of the review)	
Summary of the review (20th September 2013): Slight changes in form, language and grammar suggested and adapted, no revision with regards to content. Spelling: BFH in capital letters	
Date of acceptance of the deliverable	



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Executive Summary

This deliverable presents the final version of the TAO Handbook. It outlines the actual contents, the latest drafting process and future development of the Handbook. The Handbook itself can be accessed on the collaborative platform Wikiversity: <http://en.wikiversity.org/wiki/TAO>, a printed PDF version of the actual draft is attached to this deliverable. Even this final version of the PDF is to be seen as the latest state of a drafting process. The content of the Handbook remains accessible for revision, adaptation or completion by every interested person in the future.

The Handbook is a collection of shortened, readable and hands-on versions of the TAO project results based on real-life examples and research results. As such, it possesses links to many other project deliverables. In the annex of this deliverable the authors, contents, background subprojects and short descriptions of the respective Handbook chapters are provided.

1 Introduction

1.1 Overview of the Deliverable

According to the DoW, deliverable 4.3c is the “final version” of the TAO Handbook. The TAO Handbook can be found on the collaborative platform Wikiversity at <http://en.wikiversity.org/wiki/TAO> (start page); a direct overview of the chapters can be found on <http://en.wikiversity.org/wiki/TAO/Handbook>. As was the case with earlier drafts, the TAO consortium recommends direct online access as the best way to judge the deliverable, as it permits to experience the different links and connections between chapters and modules. In addition, a PDF document of the final drafted version of the Handbook is added to the deliverable. The overall idea and aims of the Handbook (as outlined in deliverable 4.3a) are to provide results and outcomes of TAO to the public, targeting organizations and individuals wishing to involve older adults in their online communities’ activities. Drafted in the collaborative Wikiversity, all contents included are free to be improved, revised or updated. External stakeholders have been and will continue to be able to contribute to these contents – members of the Community of Practice (CoP) as well as any other interested users. The TAO consortium followed the philosophy that by allowing and encouraging edits and additions to the Handbook, relevant information will be added and existing contents enhanced.

1.2 Connections to other Deliverables

The Handbook is a collection of TAO research results collected and adapted for dissemination to a more general public. As such, it is connected to the vast majority of previous deliverables. The main contents are provided by subprojects 1, 4 and 5: concomitant research on community activities (i.e. deliverables 1.1 to 1.5 and 4.1), preliminary studies (deliverable 4.2), and TAO survey results (deliverable 5.1 and 5.2). Some content also stems from subproject 2 (deliverables 2.1 and 2.2). Obviously, this deliverable is closely linked to deliverables 4.3a and 4.3b, which outline the concept for the Handbook and Community of Practice and introduce the first populated version of the Handbook. An overview of the Handbook chapters and the subprojects they are derived from is provided in the annex.

1.3 Value Added by the Project TAO

The Handbook website and main contents are direct results of the project TAO. The final drafted version is mainly provided by the entire TAO consortium, but external contents are included as well (e.g. results from another European project). According to the principles of Wikiversity, all contents can be edited by anyone at any time. Hence, even the final version of the Handbook presented in this deliverable does not constitute the end of the drafting process.

2 Contents and Drafting Process

Since the presentation of deliverables 4.3a and 4.3b, the formal composition of the Handbook has not been changed: The content is structured into different modules, each with a main author and other members of the TAO consortium as contributors.

The structure of some of the actual articles has been slightly modified to improve the overall consistency of the Handbook. As recommended by the TAO Evaluation and Advisory Board (EB) during its meeting in Bonn on 11 September 2012, a stronger focus was laid on practical recommendations. Therefore, old articles were reviewed and new texts structured as far as possible in the following way: 1) Introduction followed by 2) recommendations, accompanied by 3) practical examples and 4) theoretical background information. The articles close with 5) further information and 6) references. This consistent structure is introduced to the contributors in the first chapter "*How to contribute*". This first introductory chapter is followed by "*Definitions*", a chapter which explains the most important subjects, i.e. target groups and online communities. This chapter was added to previous versions to provide clear information concerning the target group of the TAO project and its understanding of online communities. Other important but short definitions such as (N)Onliner & Offliners have been integrated into longer texts or chapters. The intent of the subsequent chapter "*Background Information*" has not been changed since the last draft presented in D 4.3b: Here the main results from the preliminary and concomitant studies and surveys are described, such as general findings on ways to foster older adults' online participation, results of an exploratory study on older adults and online communication, texts on volunteer management and the mutual benefits of volunteer work, recommendations concerning the usability and accessibility of online communities and the presentation of TAO research activities such as the two waves of the TAO survey of older adults and the context analysis, which examines and describes the ways and conditions under which commercial and not-for-profit organizations in several European countries target the silver market.

The following chapter "*Activities*" presents activities that have been implemented by the TAO community or (in some cases) research partners and evaluated within TAO. Introductory remarks are given on different types of activities. Then, in a chapter on "*Online Tools*", several tools for online communities are presented in a short description together with an evaluation of their usefulness. In addition to previous drafts that mostly presented technical and background information on online tools, a module focusing more strongly on pedagogical aspects of involving older adults with these tools was added. There, research results from the European project "PEER-Dare to be wise" are integrated as an example of the efficient exchange of knowledge within a European Community of Practice.

The chapter “*General Conditions*” contains information on a broad array of topics that need to be considered in order to establish successful online communities: Based on expert knowledge, members of the TAO consortium provide information on business models, public relations, sponsorship and fundraising as well as on success factors for Communities of Practice. As is the case in the following chapter on “*Methods and Practical Tools*” these texts are not only based on TAO project results but also and mainly on expert knowledge of research within the consortium. The methods chapter contains information on co-creation with older adults, and an overview on planning and geragogical methods for efficient cooperation and fruitful seminars. An accessibility tool is presented as a practical example. This tool was developed within the TAO project and combines findings from the TAO consortium and external stakeholders.

The Handbook closes with a module on “*Problem-Oriented Access*”. Here, specific questions are posed that readers of the Handbook may have (e.g. How can members of an online community be motivated to contribute? How can we build a financially sustainable community? What are best practices in the management of volunteers?). These questions serve as problem-oriented entryways to the content of the Handbook: Based on specific interests, certain articles are suggested for reading. This is an implementation of the idea discussed in the TAO Evaluation and Advisory Board, namely to attract readers by offering them the most useful parts first and allowing them to choose freely how deeply they wish to delve into the topic.

In the annex, an overview on the chapters including its main author(s) and respective TAO subprojects is given in section 5.1; a summarizing presentation of the contents is added in 5.2.

3 Future Development of the Handbook

One of the main goals of the Handbook was to develop a successful and sustainable Community of Practice, with a diversity of stakeholders contributing to and using the Handbook. In order to achieve this, the Handbook was disseminated in the networks of all TAO partners and several open workshops were held in the cities of two TAO research partners (Maastricht and Ulm). These workshops were successful – a wide range of stakeholders, volunteers, seniors and administrators of online communities came together to listen to multileveled presentations and to discuss topics such as volunteer management, the acquisition and retention of community members, financial aspects and more. Although the outcomes of these workshops were integrated into the Handbook (e.g. in the “*Activities*” module or in the texts on Volunteer Management), no external stakeholders could be won as independent contributors. Nevertheless, external knowledge was integrated into some of the articles and the Handbook does not exist in an internal self-contained way, as will be further illustrated in the following chapter on internationalization.

To be able to offer the Handbook to a more vivid adaption by external stakeholders, the TAO consortium concluded that a translation of the contents would be extremely helpful. A German version of the Handbook would be much easier to use for the target groups in Germany and Switzerland, a Dutch version would do the same for the Netherlands. While the English language may not be much of a barrier for reading the articles of the Handbook, it definitely impedes easy contributing. The translation process will certainly not be implemented within the remainder of the TAO project but may serve as a link to future projects deriving from TAO.

4 Internationalization of the Handbook

The internationalization of the TAO project results is one of the final aims of the project. The Handbook, as a collection of these results, aims to provide the outcomes of TAO to an international public and to become a key instrument of an international Community of Practice in the field of communities for older adults.

In order to make the Handbook and CoP known in various European and other countries, the TAO partners disseminated them within their national and international networks. Some of these organizations made the Handbook and CoP known via their newsletters and events and therefore broadened the internalization again. One of the most important strategies for the internationalization was to build links with foreign organizations that work towards similar aims as the TAO consortium and are potentially interested in partnering with the TAO community partners in order to jointly develop new services and products for older adults. An important step on the way to reaching this goal was to include findings of the European project PEER in the Handbook. PEER aims at fostering informal and non-formal peer learning in online communities supported by customized Web2.0 tools for adults aged 50+¹. The project developed technical and pedagogical guidelines for operators of such online platforms, including references to the TAO research findings. Another European partnership which will carry on TAO findings is @Learn, a project that aims at developing an Active Ageing Learning Community where older adults 60+ will learn about active ageing and will be supported by 16-35 age groups both in learning and practice². The @Learn project members are part of the international Community of Practice and both in aim and content tied to many TAO ideas. Also, within the network of Seniors in the Knowledge Society, the TAO Handbook has been introduced and the Community of Practice broadened³. It is assured that the Handbook will be used and further disseminated in subsequent projects of the TAO consortium in a European context.

¹ Peer project website: <http://peer-learning-50plus.eu/>

² @Learn project website: <http://www.a-learn.eu/>

³ SeniorKS website: <http://seniorsks.uji.es/>

5 Annex

5.1 Handbook: Contents, Authors and Subprojects

Chapter/Title	Main Author(s)	Contains results from subproject...
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Introduction	Meike Westerhaus, Linda Grieser	N/A
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Definitions		
Target groups	Karen Torben-Nielsen	SP 4
Online communities	Jonathan Bennett	SP 4

Background information		
Fostering older adults' online participation	Jonathan Bennett	SP 4
Older Adults and Online Communities (Exploratory Study)	Jonathan Bennett	SP 4
Volunteer Management and Motivation	Karen Torben-Nielsen, Meike Westerhaus	SP 4
Mutual Benefits of Volunteer Work	Meike Westerhaus	SP 4
Usability	Jonathan Bennett	SP 2, SP 4
Accessibility	Linda Grieser	SP 2/3
TAO Survey Among Older Adults- Wave 1	Stijn Bannier	SP 5
TAO Survey Among Older Adults- Wave 2	Stijn Bannier	SP 5
Context Analysis	Stijn Bannier	SP 5

Activities		
<i>Notes on different types of activities:</i> Activities initiating older adults to meaningful use of the internet	Jonathan Bennett	SP4
Activities with volunteer instructors: practical experiences	Karen Torben-Nielsen	SP4
<i>Examples of activities:</i> Facebook Activities	Daniel Reich, Meike Westerhaus	SP4
Free Cruise on the Internet	Jonathan Bennett	SP1/ SP4
Online Learning Activities	Daniel Reich, Simon Lüke	SP 4
Open TAO Workshop	Jan-Mathis Schnurr, Linda Grieser	SP4
Silver Knowledge	Markus Marquard, Annette Kintzi, Elvira Schmidt, Meike Westerhaus, Ralph Schneider	SP1/ SP4
Wikimedia Seniors Outreach	Beat Estermann	SP1/SP4/SP8
Online Co-Creation	Stijn Bannier	SP1/ SP4

SeniorWeb NL's online contact services	Stijn Bannier	SP1/ SP4
Seniorweb CH	Benjamin Spycher	SP 1/SP 4
terzLivingLab	Benjamin Spycher	SP 1/SP 4

Online Tools		
Online tools: general remarks, approach and requirements Collaboration: working together, online and in real-time Web conferencing: communicating over the web Virtual classrooms: remote teaching	Simon Lüke	N/A
Online Tools and people 50+	Linda Grieser	N/A

General Conditions		
Business Models	Martin Wyttenbach	SP 1/SP 4
Public Relations	Jonathan Bennett	SP 7
Sponsorship/Fundraising	Markus Marquard, Ralph Schneider, Rüdiger Glott	N/A
Communities of Practice	Christina Boeglin, Meike Westerhaus	SP 4

Methods and Practical Tools		
Analytical framework for the evaluation of online communities	Jan Schnurr, Markus Marquard	SP4
Co-Creation with Older Persons	Stijn Bannier	N/A
Geragogical methods for cooperation and seminars	Ralph Schneider, Markus Marquard	SP 4
Accessibility Tool	Linda Grieser	SP 2/3

Problem-oriented access	Jonathan Bennett, Meike Westerhaus, Jan-Mathis Schnurr	N/A
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5.2 Handbook: Description of Contents

Chapter/Title	Description
Introduction	
Welcome to the Handbook	<i>Explains the structure of the Handbook and different ways to navigate</i>
Sharing your know-how with others – How to contribute to the Handbook	<i>Includes considerations and hints on how to contribute to the Handbook, e.g. persona</i>

	<i>approach and description of target groups.</i>
Examples of users and communities	<i>Statements/testimonials of older users/community organisers, that reveal the scope of roles older adults can fulfil in communities and show what benefit they can get from participating.</i>
Description of the idea	<i>This module explains the concept of the Handbook: the topics, aims and principle of cooperative drafting, as well as some comments on the project TAO and a link to its website.</i>
Definitions	
Target groups	<i>Whom do we target/different groups among older adults. What are older adults interested in?</i>
Online communities	<i>Definition: What are online communities? What are their assets for older adults? What needs to be considered when preparing older adults for participating in them?</i>
Background information	
Fostering older adults' online participation	<i>Necessity and strategies of TAO's goal to foster older adults' online participation</i>
Older adults and online communities	<i>General information on older adults' internet use, online communities etc.</i>
Volunteer Management and Motivation	<i>Recommendations for the management of older volunteers in online communities and list of the tasks of the volunteers' manager</i>
Mutual Benefits of Volunteer Work	<i>This chapter describes the benefits of volunteer work for both older adults and online communities</i>
Usability	<i>Excellent usability is the essential prerequisite not only for a satisfactory user experience but also for an initial buildup of trust in the online community. It comprises terms of learnability, efficiency etc. of websites</i>
Accessibility	<i>Chapter on accessibility in general and within the TAO project</i>
TAO Survey Among Older Adults – Wave 1	<i>Survey on motivations for not using the Internet and on how non-usage in this age group affects social inclusion and well-being. Wave 1 provides</i>

	<i>baseline data for the assessment of mobilizing opportunities and barriers</i>
TAO Survey Among Older Adults – Wave 2	<i>Results on the Internet usage of the participating seniors in the TAO survey</i>
Context Analysis	<i>TAO Research project describing ways and conditions under which commercial and not-for-profit organizations in several European countries target the silver market</i>
Activities	
Notes on different types of activities	<i>Providing information on different categories of activities, such as activities initiating older adults to meaningful use of the internet, activities with volunteer instructors or practical experience.</i>
Examples of activities	<i>Collection of different activities within the TAO project and its community partners, such as: Free Cruise on the Internet, Silver Knowledge, Facebook activities, online learning activities, Open TAO Workshops etc. Each activity presentation including introductory texts and case studies with documentation and recommendations (aims, activities, participants and methods of the activity, evaluation)</i>
Online Tools	
Online tools: general remarks, approach an requirements	<i>Basic information on software that may support the work of online communities in terms of collaboration</i>
Collaboration: working together, online and in real-time	<i>Information on tools that actually support collaborative creation of and work with material online</i>
Web conferencing	<i>Skype, Flash meeting etc.</i>
Virtual classrooms	<i>Adobe Connect, Viero, Big Blue Button etc.</i>
Online tools and people 50 +	<i>Research results from another European project (PEER), providing important information on technical and pedagogical aspect to consider when using online tools on a platform for adults 50 plus.</i>

General Conditions	
Business Models	<i>Summary and suggestions on business models for online communities</i>
Public Relations	<i>How to make an online community known to the target group (and general public)</i>
Sponsorship/Fundraising	<i>Finding the necessary finances for one's online community</i>
Methods and Practical Tools	
Analytical framework for the evaluation of online communities	<i>This chapter emphasizes a systematic view on the internal workings of the online community and a clear definition of its boundaries.</i>
Co-Creation with Older Persons (online collaboration, mentoring, workshops)	<i>How to involve the end users of a particular product or service in the innovation process</i>
Pedagogical methods for cooperation and seminars	<i>This chapter focuses on questions of continuing education especially of older adults and gives an overview and an introduction of corresponding pedagogical methods for cooperation, collaboration and seminars</i>
Accessibility Tool	<i>Introduction of the Content Accessibility Checker (CAC), an accessibility testing tool for websites, developed by the TAO Consortium</i>
Problem-oriented access	
<i>Helping the reader of the Handbook find respective contents of the Handbook for concrete problems, e.g. motivation of the members of a community, building a financially sustainable community or volunteer management.</i>	

Contributing Partners:



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