

# TOOLBOX FOR EFFICIENT SENIOR ENGAGEMENT

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Toolbox

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## 1. Introduction Toolbox Senior Engagement

The Toolbox Senior Engagement is based on the results of the summary report<sup>1</sup> for efficient senior engagement and 1st draft of the toolbox. From this toolbox, hwtk, as the work package leader, creates the training material for the training of Task4 members in Berlin.

The Toolbox for Senior Engagement will be transferred into training material, addressing Quadruple Helix actors (Task4s) of the six regions Budapest, Prague, Kosice, Liguria, Graz and Lodzkie enabling them to apply senior engagement techniques in the following projects process.



After the training in Berlin, the regional project teams and Task4s will identify and select unmet needs of the seniors in their regions by using engagement and co-creation techniques. In January 2021 the SilverStar Challenge - a call for innovative solutions addressing unmet needs of the elderly SilverStar invites innovators from the business sector as well as the social sector to present solutions to the revealed needs of the target group.

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<sup>1</sup> Contributing partners: Municipality of Újbuda (Budapest, 11th district), Lodzkie Region, European Grouping of Territorial Cooperation Via Carpatia, Liguria Region, Social Services Prague 9, City of Graz and nowa



## 2 Toolbox

# Living Lab





## 2.1 Living Lab approach

Living Labs are open innovation ecosystems based on a systematic user co-creation approach that integrates research and innovation activities in communities, placing citizens in the centre of innovation. This user-centred approach allows reaching sustainable answers in smart elderly care. The Living Lab approach is not focused on single products, but on a research topic. Its aim is the evaluation of ideas, scenarios, concepts and related technological artefacts in real life use cases.

This Living Lab approach will lead the Silver Star Challenge and regional pilots in the later course of the I-CARE-SMART project. Regional networks are set up in which relevant stakeholders (Quadruple Helix actors in elderly care), in particular the regional Task4s, jointly explore and extend the potential of co-creation in the area of elderly care.

*To put it in a nutshell, the Living Lab approach, as you see in the graphic, is the leading methodology for the toolbox*

## 2.2 Involvement of elderlies in co-creation processes



In the 6 regional analyses, we concluded that elderly people mostly welcome the opportunity to participate in the development of products or services, but many of them have no experience with co-creation processes. In order to get elderly people excited and engaged for co-creation processes, there are some points that should be considered. The following aspects are recommended throughout a co-creation process (before, during and after) to foster the motivation of elderly people in participating in co-creation.

- Elderly people tend to prefer face-to-face communication. Keep that in mind in the case you contact them.
- Keep in mind to see elderly people not only as in need of care, but also as people with lot of life experience.
- Keep in mind to see elderly people not only as frail and in need of care but also as potential customers and users of products and services.
- When starting a co-creation process, elderly people should not only test your product or service, they should also have the opportunity to provide their expertise and ideas in the whole development process right from the beginning.
- In general, elderly people tend to have fewer digital experiences and therefore fewer digital skills. If you are planning usability workshops with elderly people you have to be aware to provide adequate information and didactic methods.

To ensure a high motivation during and after co-creation processes, make sure to take concern certain aspects:

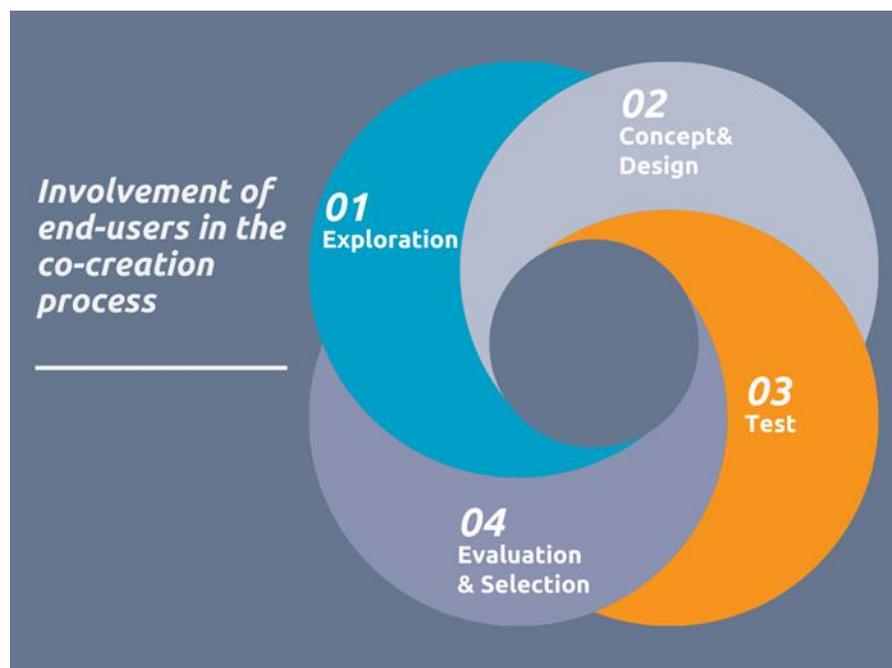
- To ensure high motivation for engagement it is important to make sure that you take the opinion and experience of elderly people seriously.



- It is important to take enough time and provide barrier-free frameworks:
  - Clarify what the goal is, what the use is, what the frameworks are.
  - Provide clear information in a barrier free language.
  - Provide clear information about time and place, methods, material, etc.
  - Provide enough breaks and beverage.
- Honour the shared time and experience. Think about how you can do this: Providing meals, goodies, vouchers, organizing events (theatre etc.) etc. Say “Thank you”.
- Keep in mind that everything is always voluntary for the participants: stay flexible in the organization.

For co-creation, it is important to have the acceptance and motivation of the target group. For those with concerns about the participation in a co-creation process and/ or with the product/ service that were used, it is important to clearly talk about the reason. Furthermore, it is very important to make sure that feedback is taken seriously, and shared opinions are considered in the following process.

Involving end users early in the development helps to make less mistakes because of the restricted perspective of the developers. Elderlies as end-users can be involved in the different stages of a co-creation process. These different stages are considered in our toolbox for efficient senior engagement. As planned later in the project, the pilot actions are open to products or services at different stages of development (idea, prototype, real life tests etc.).





### 2.2.1 How to engage elderly people?

General challenges and barriers were pointed out at the beginning of 2.2 Involvement of elderly in co-creation processes. The following points are important for a successful engagement of elderly people in co-creation:

- Define your goal(s) why you want to involve elderly people.
- Check your goals to see if they are alternately aligned and that elderly people can take something from them.
- Think about a concept that involves elderly people in a way that is aimed at getting to know the elderly's experiences appropriate.
- Make sure to take the feedback seriously and think about the different opportunities for implementation.
- Think about a concept that provides barrier-free frameworks and target group specific methods.
- Decide who should be involved.
- Contact the selected elderly people ideally face to face (or if not possible call them instead of mailing).
- In the beginning, explain the project, process, goals in an easy language
- Then explain the framework for participation (voluntary, how often, where, who are the other actors, etc.). Provide that information also in a written form for the elderly.
- Describe their benefits.
- Ask if they have any questions and/or need more information.
- get a written agreement from the elderly people that they want to participate in a co-creation process and that you are allowed to collect their data.

Once elderly people are engaged in co-creation processes, you have to provide appropriate organization and structures to keep them engaged. This means:

- Provide barrier-free frameworks (before and during events: e.g call them if something changes, provide barrier-free spaces and use easy language as well as target group specific didactic methods)
- Provide benefits for them (meals, gifts, events, knowledge)
- Up-date them on the developments

After elderly people were engaged in co-creation processes:

- Evaluate the feedback from elderly people
- Up-date them on the developments
- Provide possibilities to meet again and invite them to events



## 2.3 Exploration, Better elderly insights



The aim of the exploration stage is to reveal the unmet needs of the elderly by using co-creation techniques. This needs assessment can be done with a narrow or a wide approach. The regional project team and Task4s will decide the suitable approach and co-creation tool in their region.

The tools *Senior Advisory Board*, *Round Tables*, *Focus Group* can be used both, as part of the narrow approach as well as part of the wide approach. Some of the tools can also be suitable in a different stage of a co-creation process. E.g., a senior advisory board or a round table can be used in the implementation stage as well.

### 2.3.1 Senior Advisory Board

An advisory board is a body that can be implemented to engage end-users in different stages of the development process of a service or product. The advisory board provides non-binding strategic advice to the people in charge of the development process (management, developer etc.). The informal nature of an advisory board gives great flexibility in structure and management. The advisory board does not have authority to vote on corporate matters or bear legal fiduciary responsibilities. Many new or small businesses choose to have advisory boards in order to benefit from the knowledge of others, without the expense or formality of the board of directors. A senior advisory board can be used by public service providers, companies, projects etc. to establish a framework that makes sure to integrate the experience of elderly people.

#### Goal

The goal of a senior advisory board is to obtain the expertise of seniors, relatives and organizations representing senior. Therefore, it is useful to provide a suitable space and to create framework conditions that systematically incorporate their opinion into the processes of an organization/project.

#### Participants:

The organizing party can be the company, service provider, project team (students) that work on a solution regarding elderly care. Depending on the kind of product/ service the advisory board should include seniors and if appropriate for the process also relatives and experts from organizations representing seniors. The maximum number of members is 8 people.

#### How to Build an Advisory Board:

- **Identify your needs:** Identify what the organization, company, project team needs to achieve with an advisory board. The more specific, the better—a measurable strategic outcome is ideal. In order to co-creation, the goal is mainly about getting to know the perspective of the elderly.
- **Draft job descriptions:** The company needs to draft written profiles of ideal candidates. Once the profiles are written, then an advisory board job description can be drafted for setting up the group and informing candidates on roles and expectations.



Prospective board members should not have a pre-existing relationship with the company or its management team.

- Draft an agreement: When candidates agree to join as advisors, it is recommended to sign a job description or an agreement. While advisory boards can be fairly informal, the use of formal documents supports the results and how they are dealt with them.
- Set key performance indicators. It is important to work towards milestones. Don't be shy in executing evaluations—good advisors want goals and to be held accountable.

The organization, company, project team should provide *some kind of gift to say thank you*—whether by paying for meals, travels, an honorarium, or even offering equity at some juncture<sup>2</sup>.

### Example

- Within the concept of social services community planning (aiming at planning the local network of social services by asking about the real needs and searching for available resources so that the services are able to react to local conditions and fulfil individual needs) several city districts authorities in Prague operate senior working groups composed of experts on the issues of elderly care<sup>3</sup>. Several regional authority bodies organize consulting organs composed of senior citizens.<sup>4</sup>
- The Senior advisory board was also established in Slovakia in 2014 as a permanent advisory body of the government for solving problems for seniors<sup>5</sup>.

### 2.3.2 Round Tables with seniors

A Round Table is a form of discussion. Participants agree on a specific topic to discuss and debate. Each person has an equal right to participate, as illustrated by the idea of a circular layout referred to in the term round table. A round table focusing on topics concerning active aging can be organized in communities (politics, in NGO's, neighbourhood, start-up events, community events) to enable older people to share and actively shape their ideas about the future.

Round tables do not have a standardized procedure. Neutral moderators, the recording of the discussion and the representation of each group by the same number of persons entitled to vote regardless of their (factual / political) strength are important for a successful course<sup>6</sup>.

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<sup>2</sup> <https://www.toptal.com/finance/financial-consultants/advisory-board>

<sup>3</sup> <https://socialniportal.praha10.cz/komunitni-planovani.aspx>

<sup>4</sup> <https://praha15.cz/volene-organy/vybory-zastupitelstva/vybor-pro-socialni-oblast-a-zdravotnictvi/poradni-sbor-senioru-vyboru-zdravotnictvi-socialni-pece-rodiny-a-pece-o-senioru/>

<sup>5</sup> <https://www.employment.gov.sk/spolocny-sekretariat-vyborov/vybor-pre-seniorov/>

<sup>6</sup> <https://www.partizipation.at/zukunftskonferenz.html>



## Goal

In comparison to the senior advisory board, a round table is not a continuous format. It can be a onetime thing, but it also can take place various times depending on the process. A round table needs a moderation. A round table can be ideal if a “new” service addressing elderly people is planned and therefore you get to know what the elderlies think about it, but it also can be appropriate if you have a more general topic like “barrier-free public spaces” and to catch up with the ideas and perspectives of the elderly even before detailed planning.

## Participants

Organizing party is the company, service provider, project team (students) that works on a solution regarding elderly care. Depending on the kind of product/ service, the round table should include seniors, relatives and organizations representing seniors. The maximum number of members is 50 people (in the case that you organize different tables with familiar topics, if you just organize one table with one topic the maximum of people is 8).

## How do build a round table:

- Identify the topics you want to have discussed.
- Create and invite a diverse group for it. If you have elderly people in your network, call them or ask them face to face, if they want to join and/ or ask organization/ public providers that are representing seniors if they can invite senior and distribute the event.
- Provide food/ drinks and a barrier-free environment.

## Example

- The APs organisation of nowa and City of Graz, the Province of Styria, department 8, organized a citizens' council consisting of volunteers representing a cross-section of the population. The council came together to have a look on official documents, letters and email and give feedback if they understand the meaning. In this case, the council was not an ongoing advisory board, so it can be seen as kind of round table with a specific topic of interest.

## 2.3.3 Focus Group

A focus group is a valuable tool for collecting qualitative data. A focus group consists of a small group of people (6-8), who are brought together to explore attitudes and perceptions, feelings and ideas about a topic. The goal is to find out the relevance systems of the participants. They should set their own values and contribute what is important to them within the broad framework of questions.

## Goal

In comparison to the senior advisory board the focus group is not a continuous format. It can be a



one-time thing, but it also can take place various times depending on the process. A focus group needs a moderation and in comparison, to the round table you have a structured questionnaire. A focus group can be ideal if a “new” service addressing elderly people is planned and therefore you get to know what the elderly think about it, but it also can be appropriate if you have a more general topic like “barrier-free public spaces” and to catch up with the ideas and perspectives of the elderly even before detailed planning.

### **Participants**

Organizing party is the company, service provider, project team (students) that works on a solution regarding elderly care. Depending on the kind of product/ service the focus group should include seniors and if appropriate also relatives and experts from organization representing seniors. The maximum number of members is 6-8 people.

### **Example**

All partners in the SE-TWG did 3 Focus Groups within their regional analysis. For more information about framework and content, check the deliverable concept paper for elaborating the toolbox as well as the regional analysis and/ or contact the participating partners in the SE-TWG.

### **How do build a focus group:**

- Identify the topics you want to have discussed.
- Define a clear role for the moderation and observers.
- Define a structured questionnaire.
- Provide an audio recording for evaluation of the results.
- Provide a written agreement for the participants to sign concerning the audio recording and anonymous use of data for the evaluation.
- Create and invite a diverse group for it. If you have elderly people in your network, call them or ask them face to face, if they want to join and/ or ask organizations/ public providers that are representing seniors if they can invite seniors and distribute the event.
- Provide food/ drinks and a barrier-free environment.

### **2.3.4 Interviews**

Interviews can be used to incorporate the perspective of older people into processes as well as used as assessment tool. After our training in Berlin, the six regional Task4ses are planning a needs assessment. In the health sector, there is a large number of validated questionnaires that are used as assessment tools in geriatrics. If you have a specific topic of interest, there is the possibility to find a validate questionnaire that fits to your topic. E.g. if you want to find out about the life quality of elderly people and their needs according activities of daily living in your specific region you can take some of the listed validated questionnaires:



- WHOQOL-OLD <sup>7</sup> (international, WHO)
- Lawton MP, Brody EM. Assessment of older people: self-maintaining and instrumental activities of daily living <sup>8</sup>

If necessary, validated questionnaires can be used as part of the needs assessment to assess the needs of a group of older people. The question, of course, is whether it is best to use existing data from the region.

The validated instruments can also be used as a basis for the content planning of workshops. In the project U-TOPIA<sup>9</sup> you find from page 13-16 cards, that were used in workshops to identify challenges. For preparing similar tools for workshops with elderlies, validated questionnaires may be a proper basis.

## 2.4 Implementation

After the regional need's assessment and by a call for innovative solutions, regional pilots will take place in each region. Usability workshops also in combination with trainings are suitable in this phase. A showroom or test apartment is not listed as specific tool, but is a great resource for usability workshops and trainings.

### 2.4.1 Usability Workshops

Usability testing is watching people how they are using a product or service while they are thinking loudly.

Usability workshops bring companies, service providers, project teams (students) together with seniors with the aim that seniors test the products or services and provide their user experience. The aim of a usability workshop is that the target group of elderly people is trying out the product or service, which can be with prototypes or in a real-life test and then forward their experience in a moderated form.

A showroom or test apartment that provides access to different technologies and care products is a great resource and ideal environment for the usability workshops. It provides a natural living environment in which the tests can take place. Showrooms and possibilities to simply try out products are very important aspects for ensuring elderly people an open access to new technologies and involving them.

Usability workshops in general includes users is testing the product/ service and a fixed framework how to evaluate the user-experience.

#### Goal

Depending of the stage and type of the product/ service the elderlies are trying out the prototype/ service and collect user experience with it while being observed. The usability test can be placed

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<sup>7</sup> [https://www.who.int/mental\\_health/publications/whoqol/en/](https://www.who.int/mental_health/publications/whoqol/en/)

<sup>8</sup> [https://kcgeriatrie.de/Assessments\\_in\\_der\\_Geriatrie/Documents/iadl.pdf](https://kcgeriatrie.de/Assessments_in_der_Geriatrie/Documents/iadl.pdf)

<sup>9</sup> [https://u-topia.joanneum.at/wp-content/uploads/sites/48/2019/06/U-TOPIA.D2.1-D2.2\\_with-Annexes.pdf](https://u-topia.joanneum.at/wp-content/uploads/sites/48/2019/06/U-TOPIA.D2.1-D2.2_with-Annexes.pdf)



in a showroom or test apartment. Such a natural living environment supports the testing. Depending on the product/ service, also a real-life testing may be suitable: For example, if you developed an App to try out in daily life for a certain time or a product that the elderly person is using at home elderly person for a fixed period. However, keep in mind to offer good support for the users in real-life testing such as telephone hotlines, regular meetings, etc.

There are different ways to evaluate the user experience: Observation with a questionnaire, Interviews, focus groups, questionnaires for the user.

### **Participants**

3-5 end-users/ group: Elderly people, caregiving relatives, Health Professionals.

### **Example**

In the Co-Creation and BE TWG all partners conducted interviews with companies using co-creation methods for involving elderlies. In Graz, we conducted interviews with Joanneum Research and EMMA, that are very active in co-creation. They explained different kind of usability workshops: Usability workshops with prototypes where elderly people try out prototypes and then the developers filled out a standardized questionnaire evaluating the user experience. More and concrete examples are integrated in the handbook of co-creation and open innovation methods.

### **2.4.2 Training**

In our regional analysis, we found out that the way how the elderly come into contact with technologies is very important for their acceptance of new technologies. Providing space for elderly people to getting to know new technologies are essential factors for the participation of elderly people in digital developments and co-creation. So, in addition to usability tests, training on new technologies can be supportive to engage elderly people in co-creation processes with AAL solutions. During a training on new technologies, it is also possible to evaluate ongoing user experience. This training can for example takes place in a showroom or test apartment, where elderly people find a neutral place and receive objective information.

For the training sessions, it is important to use didactic methods that are adequate for the target group. In general, that means avoiding difficult technical terminology and English language, explaining everything from the beginning and especially explaining common symbols like the magnifying glass as a search symbol, having a lot of time for questions and offer enough time to let all people try out the products. This also means that a group has to be small to have enough room for discussion and feedback. Furthermore, the trainers should take care that if they use working papers in the training, they make sure that the letters are not too small, an easy language and pictures are used.

### **Example**



- 1) Budapest: ICT training within the project Ujbuda 60+ and digitalisation for active ageing program<sup>10</sup>
- 2) Liguria: trainings in each city halls of the town Genova<sup>11</sup>
- 3) Lodzkie Region: UTA in Łódź<sup>12</sup>, UCYFROWIENI (DIGITALIZED SENIORS), Digital Senior Academy,
- 4) Graz: nowa Lernzentrum<sup>13</sup>
- 5) Kosice: AjTy senior project organised by T-Systems Slovakia<sup>14</sup>, IT courses for seniors in the Atrium Club, MonAMI project
- 6) Prague: Elpida<sup>15</sup>

### 3 Database

A database with contact information of elderly people who are interested to participate in co-creation processes is supportive for the sustainable establishment of a Living Lab. Keep in mind to collect written agreements from the elderly people that allow you to collect their data concerning their participation in a co-creation process.

It is also important to stay in contact with your potential test users. E.g. offer regular information via newsletter or organize annual events to meet up, inform on the product developments and bring people together.

In addition, a network of stakeholders in the context of elderly care (Quadruple Helix) serves to set up an ecosystem for regional co-creation.

#### Example:

In the I-CARE-SMART study tour, we visited the living lab Happy Ageing in Belgium. In their database 300 seniors and 950 carers/healthcare providers are already involved.

Link: <http://www.happyaging.be/en/people>

### 4 Information Centers Elderly Care

The analysis also showed that projects that collect information on the subject of elderly care and that are available to all citizens are very welcome. Barrier-free access to information of new technologies ideally connected to a physical location (showroom, test apartment) is also conducive to the acceptance of new technologies by elderly people. In this sense, test apartments or

<sup>10</sup> <https://idosbarat.ujbuda.hu/ujbuda-60-program>

<sup>11</sup> <https://www.uniausergenova.it/informatica-nuove-tecnologie-e-multimedialita-2019-20/>

<sup>12</sup> <https://www.ahe.lodz.pl/en/educational-offer/uta>

<sup>13</sup> <http://www.nowa.at>

<sup>14</sup> [https://myt-systems.sk/ajtysenior\\_kurz/](https://myt-systems.sk/ajtysenior_kurz/)

<sup>15</sup> <https://www.elpida.cz/english>



showrooms can also be a push factor for elderly care in the region. Like in the Albert Schweitzer Trainingscenter<sup>16</sup> in Graz where the informal caregivers and elderlies get information and a possibility to try out different active and assisted living technologies and smart home services at show apartment. Technologies who can support older people and their relatives at home are shown in a real-life setting. Therefore, the Trainingscenter cooperates with different companies and Start-ups to offer consulting for caregivers and elderlies on what suits them best for their situation at home.

It is important to make sure that people have access to information on supporting offers concerning care. Therefore, it is highly recommended to install information hubs in regions, where all people have easy access to this information. In Liguria, Prague and in Styria such information hubs were installed.

An expansion on the topic of digitization would also be desirable in order to establish an official contact point for older people in order to receive quick and objective information about digitization in old age. For example, to find out about current supporting technologies for home care or to find out who offers which ICT course and training.

#### Examples:

- Liguria: Call Centre for active aging.  
<https://www.regione.liguria.it/homepage/salute-e-sociale/anziani/call-center-regionale-invecchiamento-attivo.html>
- Graz/ Styria: Care Information Hub Styria. Link:  
<https://www.gesundheit.steiermark.at/cms/ziel/142146817/DE/>
- Prague: Informal Care Centre (ESF funded project at Institute of Social Services Prague 4)  
<https://uss4.cz/odlehcovaci-sluzby/centrum-pro-rodinne-pecujici/>

## 6 Summary

The I-CARE-SMART project implemented three Thematic Working Groups (Senior Engagement, Business Engagement, Co-creation and Open Innovation Methods) to develop different perspectives in order to empower the partners and Task4 members in strengthening co-Creation in elderly care. This toolbox describes tools that can be used for engaging seniors in co-creation and will be transferred into training material by hwtk for the training in Berlin.

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<sup>16</sup> <https://ggz.graz.at/de/Einrichtungen/Institut/Albert-Schweitzer-Trainingszentrum>