Guidelines for recruitment and trial execution

Austria and Italy

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Acknowledgement

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Executive Summary

This document contains guidelines for recruitment and trial execution for Austria and Italy for the AAL project CareInMovement.

1 Introduction

1.1 Purpose

This document is the official deliverable 16 (Guidelines for Recruitment and trail execution) of the AAL project CareInMovement.

1.2 Scope

This deliverable is based on D4.1 User Requirements which is a prerequisite to this document and is recommended to be read prior to this document. D 4.1 describes the functionality of CareInMovement project as seen from the user perspective.

Guidelines for recruitment and trial execution in Austria and Italy are scope of this document.

This document consists of the following sections:

- Section 1 which provides an introduction to this document
- Section 2 which provides the trial specification for the countries Austria and Italy
- Section 3 which provides the assessment procedure for the end user recruitment
- Section 4 which deals with the organisation of the user training

1.3 Definitions, Acronyms and Abbreviations

HSa	Hilfswerk Salzburg (end user organisation in Austria)
Aldia	End user organisation in Italy
PEU	Primary-end-user (care recipient)
SEU	Secondary-end-user (relatives, volunteers, end user organisation employees)
CareInMovement Mentor	Divisional head within the end user organisation who guides the
CareInMovement Assistant	Employee of the end user organisation who is in direct contact with the end users and is responsible for recruitment, training and accompaniment

1.4 Relation to other documents

For recruitment the target group identification is very important. Details for target group identification are pictured in the document User requirements (Schneider, Cornelia et al. 2016).

2 Trial specification

As part of the research project CareInMovement, the end user partners Hilfswerk Salzburg (HSa) and ALDIA are responsible for the recruitment, training, accompaniment and supervision of the end users in Austria and Italy before and during the field trial.

	Primary end users		Secondary end users (informal carers)			Secondary end users (formal carers)	
	Care recipients	Care recipients Control group	Volunteers	Family members	Family members Control group	Employees of a social care organisation	Total
Austria	60	60	40	60	60	9	**289**
Italy	60	60	40	60	60	9	**289**
Total	**120**	**120**	**80**	**120**	**120**	**18**	578

Table 1: End users

In the following sections, the concepts for each country are presented.

2.1 Trial specification for the Austrian Pilot

Due to the social and infrastructural differences in rural and urban areas the consortium decided to conduct the field trials in both a rural and an urban area. Among others differences in the functionality of family support and community support are expected.

The three field test areas in Salzburg will be (1) City of Salzburg and surrounding – urban and (2) Pinzgau and (3) Tennengau – rural.

Source: http://www.salzburgnet.com/images/kartesalzburgergaue.jpg

Figure 1: Field Test Areas in Salzburg

For the field trial 60 care recipients, their family members, 9 employees of the HSa (including divisional heads – CareInMovement-mentors and professional carers – CareInMovement-

assistants) and 40 volunteers will be recruited within aforementioned 3 regions. Additionally, in order to be able to demonstrate effects of CareInMovement, a control group with 60 care recipients and their family members will be established.

An important part within the CareInMovement project is the community building process. In addition to the relatives and the professional carers, the community, consisting e.g. of neighbours, friends or other people from the immediate surrounding of the end users, is an important component of the ecosystem of the older people. Additionally, people who currently are not involved in the care process, but would like to spend their time with older people should be recruited for the project. Therefore, CareInMovement aims at including them into the project and building up a CareInMovement community.

For the trial phase it is necessary to make some preparations:

- Selection of lead users for the 1st and 2nd acceptance test

- Selection of "suitable" Hilfswerk employees for CareInMovement

- Choice of 3 mentors and their assistants

- Development of a guideline for recruiting PEUs and SEUs (family carers and volunteers)

- Info event and training of the usage of the system for the employees

- Info event for CareInMovement community in each region

2.2 Trial specification for the Italian Pilot

The trial will be conducted in two different Italian regions, Lombardia and Piemonte. In Lombardia the focus is: the province of Pavia with 72,576 inhabitants and Erba, a municipality of 16,512 inhabitants in the province of Como. In Piemonte we chose Castelnuovo Bormida, a municipality of 703 inhabitants in the province of Alexandria.

The choice of these three areas is due to the difference between smaller towns and a large province. Experience from service delivery in smaller and larger areas suggests that in smaller towns families know each other more and are more inclined to the closeness and sharing.

Source: http://italia-mappa-regionale.blogspot.it/search/label/Lombardia
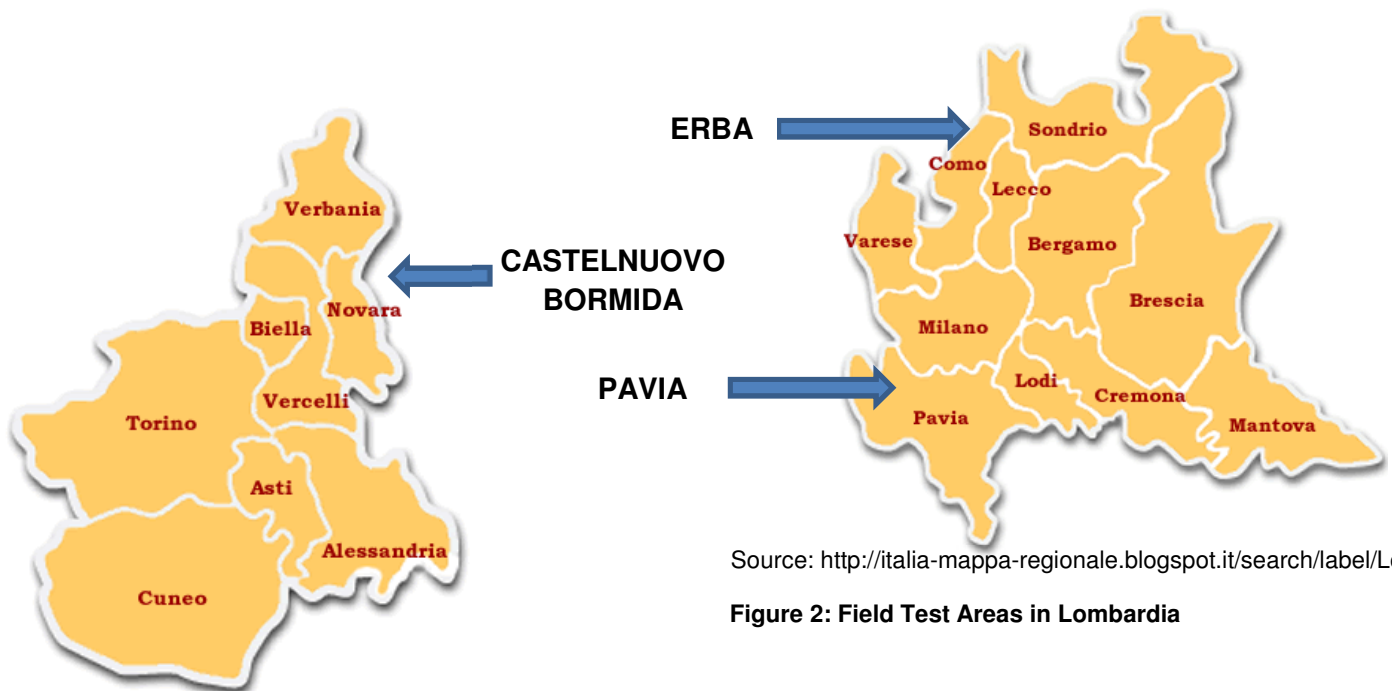
Figure 2: Field Test Areas in Lombardia

Source: http://italia-mappa-regionale.blogspot.it/2013/07/mappa-di-piemonte-regionale.html

Figure 3: Field Test Areas in Piemonte

One general objective of Care in Movement is the construction of a community, leading to the development of an active aging culture through the implementation of dynamic social networks that are sustainable over time, involving different areas and generating intergenerational solidarity. On a more specific level, a crucial objective is to build a network made up of people that surround the elderly in order to meet their needs, such as relatives, neighbors, formal workers and volunteers.

For the preparation of the trial, Aldia's strategies are:

1. **Set up a directing Board:** Outlook calendaring, activity and identification of the individual responsible for every single action and every single region

2. **Selection of the 3 CiM mentors**

3. **Selection of the CiM assistants**

4. **Construction of an association of volunteers sustainable over time**

5. **Community maintenance:** create events monthly to keep in touch the CiM community (users, volunteers, informal operators, caregivers, formal operators)

3 Assessment Procedure for End User Recruitment

3.1 Austria

First of all three regions of the province of Salzburg have been identified:

- Salzburg City and surroundings (Wals, Oberndorf)

- Pinzgau

- Tennengau

Clients of the Hilfswerk in each region are screened in terms of predetermined characteristics:

- Age 55-85

- Level of long-term care allowance between 0 and 3

- Several diseases of the circulatory or the musculoskeletal system

- No cognitive impairments

Screening data will then be analysed by WU and suitable clients will be identified. In a next step these clients will be contacted by an employee of HSa and will be informed about the project and the trial.

Beyond that an info event is planned for November 2016, where all user groups have the possibility to get detailed information about CareInMovement.

For HSa first steps into the project have been an information event for divisional heads in October 2015 - and two workshops in November and December 2015. During these workshops different user groups had the possibility to bring in their perspectives concerning the CareInMovement system. In addition, the workshops were important to inform the people about CareInMovement and to motivate them for participation.

The recruitment of the informal carers is based on the recruitment of the clients because it is necessary, that each suitable client has an informal carer who is suitable for the project. The informal carers should be in regular contact with the clients and help them to live at home.

3.2 Italy

Aldia currently provides about 150 elderly people with Homecare Assistance: activated on a request basis and partially co-funded by national Healthcare Services. For this kind of services the age range of assisted users spans from 50 to 99 and can be further detailed in the following profiles:

- PROFILE A: Elderly people capable of autonomously managing their living for whom a limited and episodic support is needed.

- PROFILE B: Non-completely autonomous elderly people, capable of partially managing their living for whom a recurring external support is needed.

- PROFILE C: Non-autonomous people, non-capable of managing their personal living because they are severely limited in their psycho-physical conditions.

Need of care together with living conditions is a significant factor, especially in defining health related service: Occasional care, Regular care, Daily care with the specific services Home care, Home help, Meals on wheels, Befriending services.

For the identification of potential CiM participants, users will be screened in terms of predetermined characteristics:

- Age 55-85

- Several diseases of the circulatory or the musculoskeletal system

- No cognitive impairments

- Low sensorial impairments

- Without severe limitations in mobility

- Living in one of the three chosen regions: Pavia, Erba, Castelnuovo Bormida.

Aldia organized 2 workshops (15th December 2015 and 22th March 2016) with 4 users in Erba, in order to present them CIM, assess their health status, investigate their abilities, their preferences, their motivation and test the first draft of the CiM system.

4 Recruitment

4.1 Recruitment in Austria

According to the project plan the group of PEUs will involve 120 people with diseases of the circulatory or the musculoskeletal system – males and females (60 people for the control and 60 people for the test group). The group of SEUs will involve 169 people involved in the care for the PEUs (9 formal carers: as CiM Assistants and CiM Mentors for the test group; 120 informal carers: 60 people for the control and 60 people for the test group; 40 volunteers for the test group).

In the following time line an overview of the recruitment process and related steps can be seen.

Topic	Period of time	Info
Info event for divisional heads of the 3 regions	September 2016	SRFG + HSa
Development of a Recruitment strategy and sampling plan	September- October 2016	WU+ HSa
Recruitment of lead users for the acceptance tests (and possibly the CiM trial phase)	October 2015 - May 2017	HSa
1st and 2nd acceptance test with lead users	August 2016 + October 2016	ES+HSa
Community building	October 2016- January 2018	HSa
Info event in the regions for possible end users and relatives	November 2016	SRFG+HSa
Collection of signed informed consent forms from PEUs and relatives, volunteers	February 2017	HSa

Table 2: Overview of the Recruitment Process in Austria

4.1.1 Recruitment of Primary End Users

The following section describes the specific recruitment in Austria. In principle, it is necessary to well inform the staff at the HSa about the relevance and scope of the CareInMovement project. They have to collect data of the primary end users in order to decide whether they might suit as test persons or not. Additionally they have to explain the project to potential test persons and motivate them to participate in the project.

Measures	Period of time	Who?
Analysis of **updated client data** from HSa to determine which clients fit target group criteria (see further c3.1)	November 2016	WU
Decision on sampling plan (see further c3.1)	November 2016	WU,
Refer on already diagnosed clients	September- October 2016	Local staff, divisional heads and Department of nursing care
Preparation of info materials about the field trial and for the control group	September – November 2016	HSa
Contact potential PEUs	November 2016- Feb 2017	CareInMovement Assistants
Collect signed informed consent from PEUs participating in the trial	February 2017	CareInMovement Assistants
Collect signed informed consent from PEUs participating in the control group	March 2017	CareInMovement Assistants

A screening of potential PEUs with a "Testbox"[1]	March- May 2017	CareInMovement Assistants

Table 3: Recruitment of End Users in Austria

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[1] Including tests about their grip strength, girths and some questions about limitations. This assessment has many advantages for the screening process. On the one hand the „Testbox" is easy to use and on the other hand you will get a result within some minutes of questioning and measure. As a result you will get the physical condition of the person.

4.1.2 Recruitment of Secondary End Users

4.1.2.1 Formal Carers

Measures	Period of time	Who?
Development of a summary of the project	October 2015	Department of nursing care
Hand out the summary to the divisional heads	October 2015	Department of nursing care
Determine 3 divisional heads as CareInMovement Mentors	September 2016	Department of nursing care
Determine 6 formal carers as CareInMovement Assistants	September 2016	CareInMovement Mentors
Collect signed informed consent from CareInMovement Assistants	November 2016	CareInMovement Mentors

Table 4: Recruitment of Formal Carers in Austria

4.1.2.2 Family Carers

Measures	Period of time	Who?
Development of an info folder about CareInMovement and for the control group	September 2016 – November 2016	Department of nursing care
Enquire data about family carers from potential primary end users	December 2016- January2017	CareInMovement Assistants and local staff
Hand out the folder to the family carers	December 2016- January2017	CareInMovement Assistants and local staff
Hand out the folder to the event „Pflegestraße" in Europark (City of Salzburg)	October 2016	Local staff
Collect signed informed consent from family carers participating in the trial	February 2017	CareInMovement Assistants
Collect signed informed consent from family carers participating in the control group	March 2017	CareInMovement Assistants
Information Event	April 2017	SRFG+ HSa

Table 5: Recruitment of Family Carers in Austria

4.1.2.3 Volunteers

Measures	Period of time	Lead
Development of an info folder about CareInMovement	August- September 2016	Department of nursing care
Hand out the folder to all volunteers working at the HSa	December 2016-January 2017	Administrative staff at the FSZ
Hand out the folder to the event „Pflegestraße" in Europark (City of Salzburg)	October 2016	Local staff
Look for volunteers in new social media	October 2016- Feb (May) 2017	Department of nursing care
Look for volunteers in the surroundings of the Primary End Users (neighbours, who do little things like water the plants,…)	October 2016- Feb (May) 2017	Local staff
Cooperation with the University of Applied Sciences Puch /Urstein to get students as volunteers	October 2016 – Feb 2017	Department of nursing care
Information Events	January 2017+ April 2017	SRFG+ HSa
Collect signed informed consent from volunteers participating in the trial	February 2017	HSa

Table 6: Recruitment of Volunteers in Austria

4.2 Recruitment in Italy

People involved in the recruitment will be:
- 120 elderly with cardiovascular and diseases of the circulatory or the musculoskeletal system (60 for the control group and 60 involved in the field trial)
- 120 informal careers
- 40 volunteers
- 3 CiM Mentors
- 10 CiM Assistants

In the following table you can find an overview of the recruitment process in Italy

Topic	Period of time	Info
Info event for divisional heads of the 3 areas	January 2016	Aldia
Development of a Recruitment strategy and sampling plan	January 2016	WU? + Aldia
Recruitment of lead users	January 2015 - May 2017	Aldia
1st acceptance test with lead users	4th October 2016	Aldia
Community building	October 2016- May 2017	Aldia
Info event in the regions for possible end users and relatives	January 2016	SRFG? + Aldia
Collection of signed informed consent forms from PEUs and relatives, volunteers	January - May 2017	Aldia

Table 7: Overview of the Recruitment Process in Italy

4.2.1 Recruitment of Primary End Users

Aldia organizes a meeting to inform the operative Director and his 3 area managers. The most important thing is to set up the directing board. The 3 area managers will choose the CiM Mentors who will select CIM assistants. All the people involved will be well motivated and informed about the relevance and the scope of the CareInMovement project.

Measures	Period of time	Who?
Analysis of **updated client data** from Aldia to determine which clients fit target group criteria	October 2016	WU
Involving our municipalities	November 2016	Aldia
Preparation of info materials about the field trial and for the control group: invitation letter, folder for service users	October – November 2016	Aldia
Arranging meetings with users to explain the project	January	Formal Carers
Collect signed informed consent participating in the	January, May 2017	CareInMovement Assistants

Measures	Period of time	Who?
trial and in the control group		
Testing with a "Testbox"[2]	March- May 2017	CareInMovement Assistants

Table 8: Recruitment of End Users in Italy

4.2.2 Recruitment of Secondary End Users

4.2.2.1 Formal Carers

Measures	Period of time	Who?
Development of a summary of the project	October 2015	Aldia
Hand out the summary to the divisional heads	October 2015	Aldia
Determine 3 divisional heads as CareInMovement Mentors	October 2016	Aldia
Determine formal carers as CareInMovement Assistants	October 2016	Aldia
Preparing folder, power points of mocks up	October 2016	Aldia
Collect signed informed consent from CareInMovement Assistants	November – December 2016	Aldia

Table 9: Recruitment of Formal Carers in Italy

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[2] Including tests about their grip strength, girths and some questions about limitations. This assessment has many advantages for the screening process. On the one hand the „Testbox" is easy to use and on the other hand you will get a result within some minutes of questioning and measure. As a result you will get the physical condition of the person.

4.2.2.2 Family Carers

Measures	Period of time	Who?
Involving our municipalities	November 2016	Aldia
Preparation of info materials about the field trial and for the control group: invitation letter, folder for service users	October – November 2016	Aldia
Arranging meeting with users and families to explain the project	January 2017	Formal Carers
Information events in each region	January 2017	Aldia
Collect signed informed consent participating in the trial and in the control group	January - May 2017	CareInMovement Assistants
Testing with a "Testbox"[3]	March- May 2017	CareInMovement Assistants

Table 10: Recruitment of Family Carers in Italy

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[3] Including tests about their grip strength, girths and some questions about limitations. This assessment has many advantages for the screening process. On the one hand the „Testbox" is easy to use and on the other hand you will get a result within some minutes of questioning and measure. As a result you will get the physical condition of the person.

4.2.2.3 Volunteers

Table 11: Recruitment of Volunteers in Italy

Measures	Period of time	Lead
Development of an info folder about CareInMovement	October 2016	Aldia
Hand out the folder to all volunteers working for Aldia	December 2016-January 2017	Aldia
Look for volunteers in new social media	October 2016- Feb (May) 2017	Aldia
Look for volunteers in the surroundings of the Primary End Users (neighbours, who do little things like water the plants,…)	October 2016- Feb (May) 2017	CIM Assistants
Cooperation with the municipalities and the university to get people as volunteers	October 2016 – Feb 2017	Aldia
Information Events	January 2017+ April 2017	Aldia
Collect signed informed consent from volunteers participating in the trial	January 2017 - May 2017	Aldia

5 Community Building

5.1 Community Building Process in Austria

For Community building it is necessary to acquire volunteers for the project and support the contacts between them.

The HSa has a long tradition and extensive experience in working with volunteers. Currently a total of 480 volunteers are in action for HSa. The high number of volunteers is a great advantage. The volunteers who are working at HSa will be informed about the project through the CareInMovement mentors and the administrative staff in the FSZs. They will get material to inform about the project. To acquire enough volunteers HSa will also hand out this material on several events like "Pflegestraße Europark".In addition, ad placement in regional media, the employee newspaper and on social media is planned. With professors of the University of Applied Sciences Puch /Urstein the HSa decided to recruit students as volunteers for 40 hours per month and as exchange they get a participation confirmation for volunteering. They could implement theory into practice because they will support elderlies

and learn how to work with elderlies. One of the most important things to get volunteers for the project is to look for them in the surroundings of the PEUs.

The next step to build up a community is an information event to inform all volunteers the same way about next steps in the project and their fields of duty. To get the volunteers informed about the project progress after the information event, the CareInMovement Mentors will have meetings with assistants and volunteers every two months.

The CareInMovement Assistants have to attend and guide the volunteers and organize volunteer meetings like coffee parties or common walks.

5.2 Community Building Process in Italy

One of the most important parts of this project consists in the recruitment of volunteers that can help take care of our users and their caregivers, supporting them in their difficult role.

It is important to keep in consideration the people network already involved, through the local network, neighbors, grandchildren, children, relatives or family friends.

In the table below you can find our strategy to build and maintain a community.

Specific Objectives	Activities	Methodologies	Notes
Set up a directing Board October - November	a) Organization general structure of the project declined according to the times and methods of implementation. b) Outlook calendaring, activity and identification of the individual responsible for every single action. c) Periodic meetings: start the project and for ongoing monitoring and verification. e) Final evaluation.	Preparation of appropriate tools for the realization of each activity: drafting technical committee meetings calendar; formalized by letter of positions of each person responsible; the minutes of the meetings and sharing with computer tool (eg. Phone Dropbox) calendar; preparation, administration and processing of the satisfaction questionnaires in relation to each activity; evaluation meetings with the control group in the phase of intermediate	Within the director's table will include: 1. Federica, whose skills will enable a more effective and efficient management of monitoring, assessment and evaluation; 1. A person specifically dedicated to the training of operators Aldia 2. A person dedicated to the coordination of volunteers 3. A person involved to home users

		verification.	
Information about CIM November - December	a) Any Cim Mentor meet the group of formal operators (CIM Assistants) to explain the project. In any meeting they will explain the project, and give specific trails to the operators. b) Any formal operator talk to the users and their families by presenting the project accompanied by a letter in which our organization invite users and families to participate to a meeting in which they will explain everything, c) Invite the users and the families to a meeting with 10 families in which they explain the project, and their advantages. d) Realization of an event to promote the project to the citizen, the journalists and the third sector. e) Create informative papers (e.g. Brochures, flyers) to test a business strategy with the informal persons involved	Design and production of brochures and flyers Distribution to the CIM Assistants Distribution to the families Monitoring the liking of the conference through a special register quantity of participants.	Impact assessment on citizenship. Creating a list of people interested.

| Building a volunteers community

September - march | Cim mentors involved Aldia volunteers, 10 persons in a meeting, to explain and involve them in the project

Distribution in schools, businesses and public areas, through social networks and sites of the municipalities and local media, social web.

Look for volunteers through our CIM Assistants contact our users' neighbours, nephiews, nieces, sons, daughters

Cooperation with municipalities and University to find new volunteers

Information events meeting | Brochures and flyers

Meetings specifically dedicated to the "voluntary training" monthly (appetizers, breackfasts) events to mantain the people involved | |
| Maintenance Community

January - March | "Gruppi di Cammino"

Before the texting period we'll organize walking group to promote active aging; in this way we can explain to the persons involved how important is health for a good life and it will be easy to link Cim and its potential. | Maintain the community of people involved and connect. Our suggestion is to create this events monthly, to keep in touch the Cim' community (users, volunteers, informal operators, caregivers, formal operators. | |

	"One night Apericena" An event held in Pavia and Erba every month, during the test process, to create a socializing moment for Cim's People. We will have "aperitivo" and dinner all together to have conversation about the use of Cim and its functions in a relaxing moment in which they can speack about persona life as well.		

6 Organisation of Training

6.1 Austria

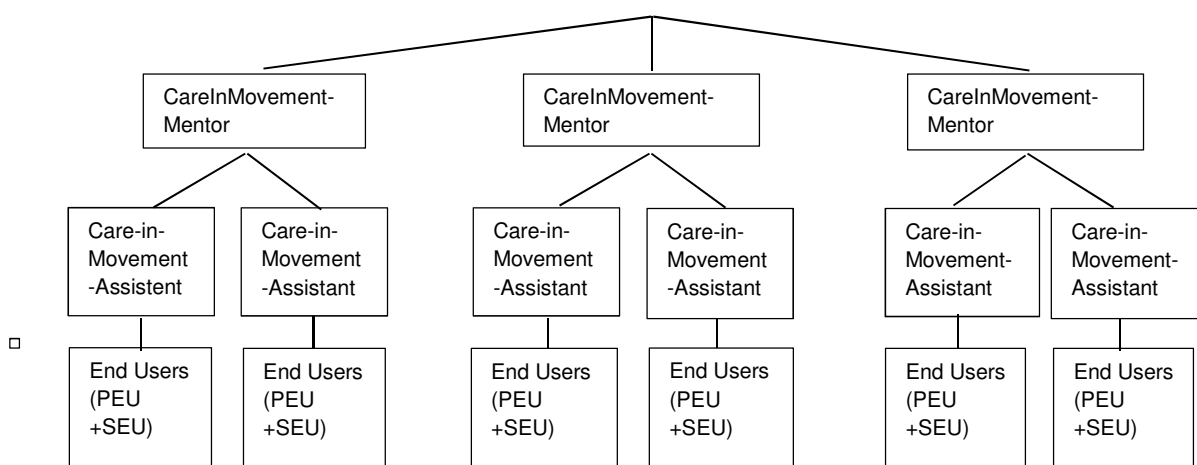In the following illustration, the organisation of the training is shown:

Figure 4: Organisation of the training and support by Hilfswerk Salzburg

Support will be provided by the Department of nursing care (HSa) and SRFG.

In each region there is one mentor. As shown in the graph above, the mentor is together with the department of nursing care primarily for the monitoring and supervision of CareInMovement Assistant responsible. The HSa has a Family- and Social centre in every region of the province of Salzburg. In each centre the Department of nursing care is represented through a division manager for nursing care and a division manager for social work. This division manager will take over the role of a mentor for "CareInMovement".

In the preparation phase the CareInMovement Mentor has to choose suitable CareInMovement Assistants (employees of the Hilfswerk) in the field of home care or home help and support.

In collaboration with the department of nursing care the mentor has to train the CareInMovement Assistants regarding the recruitment process. The CareInMovement Assistants are responsible for the recruitment and support of the end users.

After completion of the recruitment the CareInMovement Assistants get a system training. The training is conducted by the mentor in collaboration with the department of nursing care of the HSa and SRFG. In the implementation phase the CareInMovement Assistant is responsible for the system training (use and configuration of Care in Movement) of the elderly and its relatives and volunteers.

In this phase the CareInMovement Mentor is the first contact person for the trainees (CareInMovement Assistants), responsible for the coaching and support.

In the table line the steps of the training process and related steps can be seen.

Topic	Period of time	Info
System training for the employees of Hilfswerk	April 2017	SRFG + HSa
Training for CiM Assistants for physical tests of PEUs ("Testbox")		
Info event for the community	April 2017	SRFG+ HSa
System demo and info material on how to use the system	April 2017	
Training of relatives	April 2017	HSa
Training of volunteers		
Training of PEUs		
Teststart	May-June 2017	

Table 12: Steps of the Training Process in Austria

6.2 Italy

In the following illustration, the organisation of the training is shown:
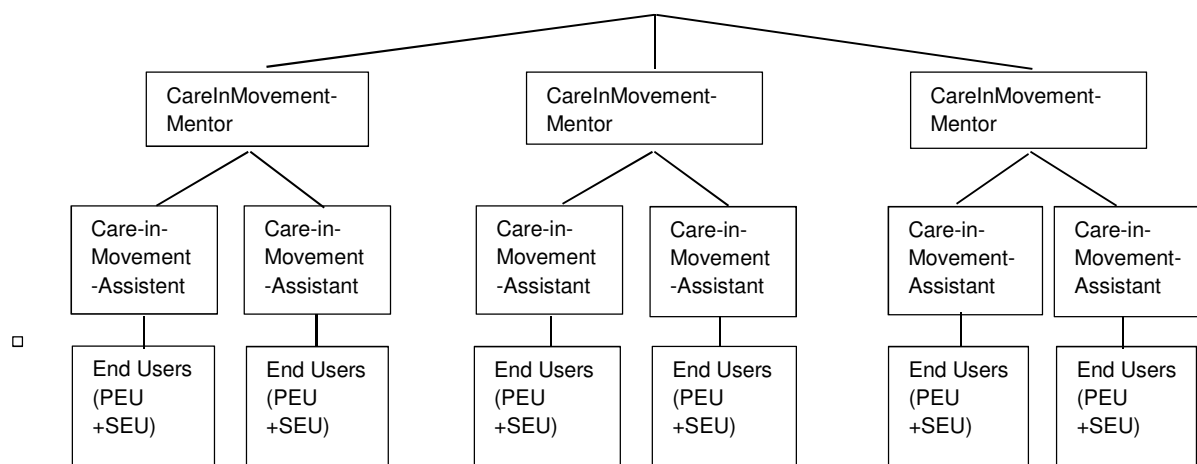

Figure 5: Organisation of the training and support by Aldia

In each region there is one mentor. As shown in the graph above, the mentor is together with Aldia for the monitoring and supervision of CareInMovement Assistant responsible. In each region Aldia's mentors are involved in the services' organization and in the formal operators' management.

In the preparation phase the CareInMovement Mentor has to choose suitable CareInMovement Assistants (Aldia formal operators) in the field of home care or home help and support.

The mentors have to train the CareInMovement Assistants regarding the recruitment process. The CareInMovement Assistants are responsible for the recruitment and support of the end users.

After completion of the recruitment the CareInMovement Assistants get a system training. The training is conducted by the mentor in collaboration with Ilogs. In the implementation phase the CareInMovement Assistant is responsible for the system training (use and configuration of Care in Movement) of the elderly and its relatives and volunteers.

In this phase the CareInMovement Mentor is the first contact person for the trainees (CareInMovement Assistants), responsible for the coaching and support.

In the table line the steps of the training process and related steps can be seen.

In the following table the steps of the training process and related steps can be seen.

Topic	Period of time	Info
System training for the employees of Aldia	March 2017	Ilogs - Aldia
Training for CiM Assistants for physical tests of PEUs	March 2017	Aldia, Universität Salzburg

("Testbox")		
Info event for the community	April 2017	Aldia
System demo and info material on how to use the system	April 2017	Ilogs - Aldia
Training of relatives	April 2017	Aldia
Training of volunteers	April 2017	Aldia
Training of PEUs	April 2017	Aldia
Teststart	May-June 2017	Aldia

Table 13: Steps of the Training Process in Italy