

## D.1.1 User Consultation Protocol and Tools



### Gamified Collaborative Platform for the Promotion of Sustainable Care and Independent Assisted Living

Grant Agreement No.	AAL-2014-79
Project acronym	MyMate
Start date of project (Dur.)	1 November, 2015 (24 months)
Document due date :	31/01/2016 – Month 3
Leader of this report	InnovaTec
Deliverable No.	D.1.1
Deliverable Name	User Consultation Protocols and Tools
Dissemination Level	Public
Contact Person	Elena Morant
Abstract	The purpose of this document is to describe the tools and protocols we will use in order to engage with all types of end users and in order to inform the design and development of the MyMate technology.
Version	2.0



## EXECUTIVE SUMMARY

The purpose of this document is to describe the tools and protocols we will use in order to engage with all types of end users and in order to inform the design and development of the MyMate technology. User consultation is built into the project at every stage. We have defined, as part of the project plan, three types of users: primary users, that is those elderly people who will benefit most directly from the MyMate solution and who will be recipients of MyMate services; secondary users, that is the elderly volunteer carers who will be mobilised and motivated through adoption of the MyMate technology; and tertiary users, that is the elderly care providers, social care organisations and public authorities who will manage the implementation of the MyMate solution. Our tools and protocols are designed to engage with all three of these groups. This document sets out the research basis upon which we have developed our tools and provides the tools themselves that we aim to use as a basis for our engagements.

PLEASE NOTE: the original version of this document was designed to address the needs of user consultation in the first round of engagements. This round of engagements involved all three user groups and was broadly focused to address all aspects of the MyMate solution in order to generate ideas and data that would inform the design and development process. This later version of the document also includes the protocols developed for the first user consultation event held at Month 12. The focus for this event was to explore the appropriateness of the 'missions' that we have thus far generated and to get feedback on those missions. The ideas and questions associated with those missions are included towards the end of this Version 2 document.

## Table of Contents

<b>EXECUTIVE SUMMARY .....</b>	<b>2</b>
<b>1 INTRODUCTION .....</b>	<b>4</b>
1.1 Project background and vision .....	4
1.2. Document description .....	5
<b>2. USER CONSULTATION PROCESS AND PROTOCOL .....</b>	<b>6</b>
2.1. Purpose of the protocol.....	6
2.2. Participants.....	6
<b>3. CONTEXT: ANALYSIS OF CURRENT APPROACHES.....</b>	<b>8</b>
3.1 Overview .....	8
3.2 Methods Used .....	8
3.3 Case Studies in the Area of Assessing Technology Impact on Seniors .....	10
3.3.1 Senior Technology Literacy and Access Project .....	10
3.3.2 STREAM Personal TV (Hull UK) .....	11
3.3.3 Looking Local/ T-Seniority.....	12
<i>Headlines from the T-Seniority research:.....</i>	<i>13</i>
3.4 Key Findings of the Research .....	13
3.4.1 Methodology.....	13
3.4.2 Socio-Economic and Organisational Factors.....	15
3.5 Conclusions .....	16
<b>4. SCOPE OF THE CONSULTATION .....</b>	<b>17</b>
4.1 Overview .....	17
4.2 Areas of assessment.....	17
4.3 The Consultation Process .....	19
<b>5. THE CONSULTATION PROTOCOLS.....</b>	<b>19</b>
5.1 Initial Focus Group Guidelines.....	19
5.2 Specific focus group questions and accompanying questionnaires.....	23
5.2.2 Questionnaire for Tertiary End Users.....	26
5.2.3 Focus Group Session 2: The consultation process that user centres will run themselves with primary users in their own countries.....	31
5.2.4 Questionnaire for Primary End Users.....	32
5.2.5 Focus Group Session 3: The consultation process that user centres will run themselves with secondary users in their own countries:.....	35
5.2.6 Questionnaire for Secondary End Users .....	36
5.3 Protocols for first end user engagements at Month 12.....	41
5.3.1 Focus Group Session Plan .....	41
5.3.2 Specific focus group questions.....	42
5.3.2.1 Focus Group Session 1: FOR PRIMARY USERS .....	42
5.3.2.2 Focus Group Session 2: FOR SECONDARY USERS .....	43
5.3.2.3 Focus Group Session 3: FOR TERTIARY USERS .....	44

## 1. INTRODUCTION

### 1.1 Project background and vision

Project MyMATE aims at generating a novel elderly (primary) user-centred care paradigm involving the development and testing of an ICT-based solution in real life situations which will enable and support sustainable “care in the community” models for older adults. Given the complex challenges posed by current demographic trends, the development of ICT-solutions, whilst striving for improved cost effectiveness, must also strive to humanize, rather than dehumanize care provision. The MyMATE consortium is of the view that these challenges can be addressed effectively if a gamification approach, combined with a human touch, is applied to an ICT-based solution.

The MyMATE ICT solution is innovative in that it aims to apply a gamification approach to create a network of motivated, healthy, agile elderly volunteers who will act as “human sensors” in the implementation of “care in the community” programmes for elderly people. The aim in project MyMATE is to develop a sustainable environment centred around an ICT-based solution that:

- Reconciles increased demand with limited resources – As the AAL Call text highlights, the demographic trends are well researched and underline the need for ideas and initiatives that offer more than increased efficiencies in the use of finite resources. Novel approaches must be explored that can anticipate future trends in demand.
- Increases and facilitates the supply of formal and informal care for older adults – On the supply side, the MyMATE solution offers an approach to facilitating formal care by increasing the supply of informal carers and strengthening the collaboration between formal and informal carers so that formal care resources can be used more efficiently. By increasing informal care resources through building a network of healthy elderly volunteers, the MyMATE approach will contribute to active aging and in so doing ease the pressure in demand for formal care in the future.
- Reduces the demand for care through prevention and self-management – The MyMATE approach is to create an environment in which elderly people help each other and derive benefit from doing so.
- Supports the shift towards better care at home and in the community – The MyMATE initiative is conceived as an approach to support “care in the community programmes” in which elderly individuals are subject to individually tailored care plans, designed and managed by care managers so that the elderly person under care can remain can live independent lives in the comfort of their own homes. The challenge is to support such a shift in an evolving climate of increasing demand but decreasing resources.

- The MyMATE approach will direct new technologies toward fostering and structuring real relationships between real subjects.

## 1.2. Document description

It is essential to know if the concept we have developed for **MyMate** is in line with the worldwide experts' expectations in the field of technology-based care of elderly people and be sure that **MyMate** objectives are aligned with the main stakeholders and end users opinions.

User consultations comprises activities related to defining user needs and ensuring the **MyMate** solution meets the express requirements of all stakeholders involved in – and receiving – elderly care. We must also ensure that the **MyMate** solution is to be also cost effective. User consultation also has to provide critical input to the development of exploitation strategy and the **MyMate** business planning process.

This document provides the protocol of actions to be implemented in order to collect data on user requirements concerning **MyMate**. This deliverable, D1.1 User Consultation Protocols and Tools, is a part of the **MyMate** project work package 1: User Consultations and Requirements Definition.

## 2. USER CONSULTATION PROCESS AND PROTOCOL

This chapter presents the purpose of the User Consultation Process Protocol, introduces the participants of the consultation process, describes the procedure and main tools to gather data and explains how the data will be analysed and published.

### 2.1. Purpose of the protocol

User Consultation Process Protocol and Tools (Task 2.1) is a preliminary task that involves the design of the consultation process and description of the various tools which will be used to gather feedback (e.g. focus groups, questionnaires, interview process). This task is led by White Loop Limited and all partners participate in the planning of the user consultation tools.

This User Consultation Process Protocol and Tools document sets up the guidelines to implement the project task 2.2, Identification of Content and Game Use, that will involve a consultation process with end users to determine the functionality requirements for development and integration of the MyMate technology.

The specific purpose of the protocol – as defined in the description of work – is to do the following:

- Develop a set of game proposals based on the input gathered from primary, secondary and tertiary users. The co-creation process (Prahalad y Ramaswamy, 2004) will focus on the development of a series of mission 'scenarios' that enable secondary and tertiary users to understand the primary user experience and to explore how they, as operatives in the field, might use the MyMATE environment to improve the impact of the care provided.
- Evaluate the mission scenarios with all categories of user to establish the level of engagement, interest and immersion they create and refine the plans for development in accordance with this end-user feedback.
- Produce a final set of mission proposals that integrate the outputs of consultation with all categories of users to be carried forward into the work to be completed in WP2.

### 2.2. Participants

The aim of this phase of work is to determine, with input from primary, secondary and tertiary users, the added-value that a game-based approach can bring to the organisation and delivery of care in the community programmes through the use of the MyMATE platform. The focus should be on quality of life outcomes for primary users, the motivational and quality of life outcomes for the secondary user and the efficiency and effectiveness of care plan management and delivery for tertiary users.

In this scenario, it is important to understand what constitutes a user within our own definition.

For that purpose, definitions are provided for each user group below:

- A primary user is an elderly person in need of care and under the responsibility of a care centre or centralised authority. Primary end users will be the main beneficiaries of the MyMate approach in that their care will be improved.
- A secondary user is an individual who will be required to directly use the MyMate technology as a means of managing their involvement with primary users. Secondary users will be the 'players' of the MyMate 'game' and will have direct contact with those primary users who will be the main beneficiaries of the technology.
- A tertiary user will be an organisation responsible for the management of the MyMate technology. In this case, a tertiary user is likely to be an elderly care centre or an authority that is responsible for the care of elderly people.

The consultation process will involve at least 30 primary users, 60 secondary users and 15 tertiary users, organised by the 3 user partners involved in the project. The choice of individual primary and secondary users will be the responsibility of the care providers themselves and the choice will be made taking into account the need for diversity, (e.g. age, sex, gender identity, capabilities, interests etc.).

## 2. CONTEXT: ANALYSIS OF CURRENT APPROACHES

### 3.1 Overview

In order to inform the development of our own methodology, we first undertook an extensive study of current approaches to the impact assessment of technology, specifically with reference to its use with seniors. This provides us with a research baseline from which we can develop a coherent and methodologically sound framework that will achieve the objectives for WP<sub>1</sub> as set out on the Description of Work.

In this section, we first present the methods used to develop this baseline. Then we discuss the specific findings with reference to studies, primary evidence and other relevant material. Finally, we draw some conclusions that will feed into the framework described later in this document.

It is, perhaps, important to point out that during our extensive research, we uncovered very little in terms of an assessment methodology or approach that was entirely comparable to what we are proposing as part of Project MyMate. As there are no products currently on the market that use mobile technology in the way that we are proposing in MyMate, there are subsequently no accompanying assessment approaches. Therefore, our research has focussed on a number of complimentary areas that will help in informing our approach.

### 3.2 Methods Used

In determining what it is we are aiming to assess we are also looking to establish how we are going to assess it, that is to say developing a methodology for capturing and interpreting the secondary user input into our impact assessment. To that end a study of relevant methodologies currently employed was made with a view to adaptation to the novel environment of MyMate. Given the difficulty of establishing a robust methodology for such a novel project as MyMate it wasn't possible to find evidence of and compare methodologies developed for carrying out user consultation activities. Therefore, the research carried out in part went into developing an understanding of the socio-economic and organisational impact of ICT through analysing methodologies for how such assessments are performed within the context of an educational institution. There is a significant body of research around implementing technologies within educational institutions and this can be very useful as a context for the MyMate technology and its implementation within support centres for seniors.

As the usability of the MyMate technology will be assessed by the methodology developed in WP<sub>3</sub>, understanding the impact of technology on chosen application environments and on primary, secondary and tertiary users is considered paramount. In terms of socio-economic and organisational considerations then, the direct impact of technology on seniors was only considered in terms of the social impact the technology had – we are not concerned, in WP<sub>1</sub>, with the uptake of the technology from a usability perspective.

Approaches to constructing indicators in relation to ICT were studied, adapted and incorporated into the methodology for impact assessment explained in Part 5 of this deliverable. The methodology outlined in the UNESCO guidance document *Developing and Using Indicators of ICT Use in Education*<sup>1</sup> describes a step by step process for preparing a consolidated set of ICT indicators within an educational context as well as describing the correct use of both quantitative and qualitative data in impact assessments

Our research into this baseline also focused on studies and approaches that would help us understand the socio-economic and organisational impact of technology in any setting where seniors congregate as a group. In order not to duplicate the analysis developed in WP3, we focussed on the specific requirements ICT imposes on both secondary users (support staff to seniors) and their organisations with a view to better understanding the conditions needed for effective deployment of the MyMate technology. In analysing these requirements we were interested in both organisational factors such as the logistical needs of senior centres when preparing to institute the technology as well as social factors such as the motivation required of those staff who would perform a secondary user role. The intention was to develop a holistic understanding of how to accurately measure these requirements.

Due to the novel nature of the MyMate project, it proved very difficult to find evidence of a directly related baseline, namely the socio-economic and organisational impact assessment outlined above directly related to the use of mobile technology for addressing the care challenges faced by seniors. Therefore, an extensive literature survey was carried out on the measurement of requirements (outlined above) imposed on institutions by the use of ICT in the first instance, with the addition of a limited number of studies found into the impact of the use of such technology in an institutionalised environment.

*Technology Integration Progress Gauge* provided examples of key socio-economic and organisational indicators as used in institutions<sup>2</sup>, *Academic computing at Malaysian colleges*<sup>3</sup> offered key objectives on measuring ICT Infrastructure and Institutional ICT Support.

Having consulted a number of the relevant impact assessment studies, tools and methodologies available to practitioners in this area, the analysis moved on to gathering evidence on how these approaches are put into practice. At this stage of the research a number of experts who are directly involved in working with groups of seniors were identified and consulted directly through the running of surveys and where possible face to face interviews.

Further to this it was also necessary to understand the effect that instituting the MyMate technology would have on the primary user (the senior), the test subject, by consulting experts

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<sup>1</sup> *Developing and Using Indicators of ICT Use in Education*, compiled and published by UNESCO Asia and Pacific Regional Bureau of Education, 2003 (IPS/03/OS/152 - 1500), <http://www.unescobkk.org>

<sup>2</sup> *Technology Integration Progress Gauge*, SERVE - Improving learning through Research & Development website, <http://www.serve.org/>

<sup>3</sup> Mokhtar, S., Alias, R., & Abdul Rahman, A. (2007, June 13). Academic computing at Malaysian colleges. *International Journal of Education and Development using ICT* [Online], 3(2). Available: <http://ijedict.dec.uwi.edu/viewarticle.php?id=312>.

in the field. Our study does not relate to the MyMate technology's usability in terms of motivation for the users while engaging with the technology and the possible difficulties that may arise during the testing procedure or an analysis of the social worth as these issues are addressed in WP3. Rather we focus on issues related to how participation with the MyMate technology would impact upon the care outcomes of primary users within the context of the organisation that they are a part of. It needs to be stressed however, that this research was gathered through consultation of relevant experts and not through the involvement of seniors themselves (the primary user and test subject).

### 3.3 Case Studies in the Area of Assessing Technology Impact on Seniors

The following case studies give clear guidance as to the factors to be taken into account when designing protocols for the assessment of the impact technology has on seniors. In some cases, the information presented here will be more useful to the work in WP3 (and where that is the case, information has been shared). However, these examples provide a useful baseline for the development of our own methodology and our own assessment process as presented later in this deliverable:

#### 3.3.1 Senior Technology Literacy and Access Project

##### Local Survey of Organizations Serving Seniors

Volunteer members of the Citizens Technology and Telecommunications Advisory Board conducted telephone and in-person interviews during February 1998 to gather information and input from organizations around the city about how and to what extent older people in Seattle were participating in, and engaging with, computer programs and services. Interviews were conducted with representatives of senior services, community and ethnic agencies, computer labs and training centres.

The project committee determined the following goals for the project:

- Build capacity in the community for use of computers by seniors (for example, training, helping connect existing resources, wiring existing sites, becoming more competitive for future resources)
- Build a dialogue about seniors and computers, including possible uses of computers and how computers affect seniors
- Encourage senior groups to work together
- Encourage seniors and those of other ages to work together
- Reach seniors who currently have little access to or knowledge about computers

The three key areas of questioning focussed on the following core issues:

- Most Important/Beneficial Ways for Seniors To Use Computers
- Factors that Most Enable or Attract Seniors To Use Computers
- Largest Challenges/Barriers to Senior Use of Computers

### 3.3.2 STREAM Personal TV (Hull UK)

The STREAM Personal TV - Independent Living Campaign provides vulnerable older people with access to local programmes and services through their existing television. It is a UK Flagship project for Inclusive eGovernment.

Each person receives a digital television set top box that gives them access to the free digital television channels, and a broadband connection that provides them with access to interactive local services entirely on demand. A single button on the remote control takes the person to STREAM.

Once there, the service pulls together video and text-based information from a range of partners and targets it to particular individuals based on their needs. Services that other users have found useful are also recommended to the user. Users also have access to email and a personalised calendar that can be integrated with third-party diary systems.

Viewers have a choice of locally produced programmes and a rapidly expanding catalogue of national content. STREAM has signed a syndication agreement with NHS Choices on all its online video material, and is currently working with other national bodies such as the Stroke Association and the Alzheimer's Society to produce more programmes, giving users a rich vein of information on a wide range of health-related topics.

The STREAM project was assessed as part of the UK local government performance framework announced in 2007. This framework is underpinned by 198 individual indicators. This national indicator set was developed as part of the UK Government's Comprehensive Spending Review 2007.

The structure of each indicator is as follows:

- First, there is a clearly defined objective
- Second, there is a named national indicator
- Third, the indicator is described in detail

Here below are two examples of indicators developed as part of the UK national indicator set, 2007:

#### **Outcome (Objective): Adult health and wellbeing - PSA 18**

National Indicator:

NI 136: People supported to live independently through social services (all adults)

This indicator will measure the number of adults all ages per 100,000 population that are assisted directly through social services assessed/care planned, funded support to live independently, plus those supported through organisations that receive social services grant funded services.

**Outcome (Objective): Tackling exclusion and promoting equality - PSA 17**

National Indicator:

NI 142: Percentage of vulnerable people who are supported to maintain independent living

The number of service users (i.e. people who are receiving a Supporting People Service) who have established or are maintaining independent living, as a percentage of the total number of service users who have been in receipt of Supporting People services during the period.

Independent living is defined as someone living in their home or in long stay accommodation. A care home (both residential and nursing care), a hospice, long stay hospital or prison are not defined as independent living.

### 3.3.3 Looking Local/ T-Seniority

<http://www.lookinglocal.gov.uk/site/news/2010-10-12-telecare.html>

Looking Local is leading the UK's evaluation of eHealth and Telecare services on digital interactive TV. For nearly two years Looking Local has run separate telecare programmes; the

EU funded T-Seniority project & a project in the Borders funded by the Government's Technology Strategy Board.

#### T-Seniority

<http://tseniority.idieikon.com/index.php/lang-en/about-t-seniority>

**T-Seniority** is a "SaaS" ("Software as a Service") **funded under the EU ICT Policy Support Programme (PSP) and supported by the CIP programme** which will be accessible in dedicated European areas **via digital TV**. Its main aim is to *empower Independent Living* for older people and meet their varied needs. The end game is to contribute to and improve independence for older people through a set of services that puts them as the central stakeholder. Services will be accessed via the TV, as it is the *most widely used* and in many cases the *preferred electronic channel*, needing little introduction or maintenance.

**T-Seniority** will be set-up in the daily living environment of elderly users for supporting their personal autonomy, using as main mean the TV channel. This daily living environment will include home environment but also will create a closer relation with carers (formal and informal) with support applications and services under the categories of: Daily Life activities, Social Integration; Protected and supported living and Mobility.

Initial evaluation of the T-Seniority results show that older people are incredibly keen on using TV as a channel to access health and related services and can now be seriously considered as a viable alternative to the web as a channel of choice and service efficiencies.

Headlines from the T-Seniority research:

- 90% felt more informed with the service
- 81% felt the service made their life easier by giving them more autonomy over their life
- 38% used it daily, 30% used it on a weekly basis, 16% monthly and the rest less frequently
- 43% felt closer to their family via the email access
- 75% felt more confident towards new technology after the trial
- 80% felt T-Seniority enriched their means of communication
- 85% wanted to continue with the service after the trial
- 88% found the information and services clear and user friendly
- 97% could navigate the service without help
- 100% of participants used email and other areas of interest were highlighted as transport and health services, news & weather
- 88% found it sufficiently useful or very useful

The evaluation of the T-Seniority project was undertaken in two parts:

- Researchers interviewed 90 people in Kent, Alston and Sefton who had been given access to the T-Seniority service for a number of months
- A questionnaire ran on the Looking Local service for several months and received 370 responses

### 3.4 Key Findings of the Research

In this section we will present a breakdown of some of the key approaches to and methodologies for preparing impact assessments, considered most relevant to the needs of the MyMate project.

#### 3.4.1 Methodology

As the basic building block for the impact assessment methodology to be carried out in this deliverable are indicators, it seems logical to begin with a clarification of what constitutes a successful indicator. Some authors insist that indicators in order to record information

accurately must be something that is quantifiable, however, others take a much wider view, and cite the importance of descriptive statements within the scope of indicators. Mokhtar, Alias & Rahman cite the latter view as stated by the *International Standards Organisation* which defines a performance indicator as "a numerical, symbolic or verbal expression derived from statistics and data that characterises the performance of a service or facility" (International Standards Organisation, 1998)<sup>4</sup>. Indicators are refined through the use of rubrics, which "are sets of categories that define and describe the important components of the areas being assessed. Each category contains a gradation of performance levels with a score assigned to each level and a clear description of what criteria need to be met to attain the score at each level."<sup>5</sup>

UNESCO has developed a methodology to develop *indicators* which help the *user* to build a clear set of assessment objectives and afterwards collect data in an accurate and faithful way as well as allowing for the measurement of different degrees of compliance with assessment objectives, set out as a *rubric*. The methodology sets out a clear step by step process concerning the formation of indicators with a particular emphasis on developing and assessing trial indicators with external stakeholders to ensure *high face validity*. High face validity in ensuring that an indicator is intuitively understood, helps to ensure that assessment data sets are not the result of end users providing different interpretations of an ambiguous indicator. The same methodology outlines a clear set of criteria based on a proper mix of quantitative and qualitative, with objectivity. Qualitative measures have value as long as the indicator is "clearly and consistently defined".<sup>6</sup>

UNESCO encourages the use of a variety of methods for collecting data through response to predetermined indicators. As well as the use of standard survey questionnaires and telephone interviews, the report advocates the use of internet-based surveys as an efficient way of collecting data from institutions where a number of stakeholders are to be consulted. Logically, where only one stakeholder within an institution is to be consulted this is an inefficient way of collecting indicators. Internet-based surveys can be placed internally on an institutions website, where it can easily be accessed by all relevant teaching and administrative staff and data collection coordinated by a head teacher or senior specialist. Furthermore, data entered into a web based survey can be automatically uploaded into a managed central server system. However, this process is largely dependent on the coordination efforts of certain key staff, who need to allocate time to carry out this role.

The CEO Forum on Education & Technology has developed two School Technology & Readiness (STaR) Charts, which provide an holistic assessment of an "institution's level of

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<sup>4</sup> Mokhtar, S., Alias, R., & Abdul Rahman, A. (2007, June 13). Academic computing at Malaysian colleges. *International Journal of Education and Development using ICT* [Online], 3(2). Available: <http://ijedict.dec.uwi.edu/viewarticle.php?id=312>.

<sup>5</sup> Mokhtar, S., Alias, R., & Abdul Rahman, A. (2007, June 13). Academic computing at Malaysian colleges. *International Journal of Education and Development using ICT* [Online], 3(2). Available: <http://ijedict.dec.uwi.edu/viewarticle.php?id=312>.

<sup>6</sup> *Developing and Using Indicators of ICT Use in Education*, compiled and published by UNESCO Asia and Pacific Regional Bureau of Education, 2003 (IPS/03/OS/152 – 1500), <http://www.unescobkk.org>

readiness in using technology". An understanding of this approach – the use of technology within an educational institution – could be very useful as a baseline for the development of an approach within the participating institutions in the MyMate project. As well as evaluating the capacity of an institution to successfully utilise technology, this report also helps institutions to develop "target areas" (p.17)<sup>7</sup> for making improvements and readjustments based on data sourced by a set of indicators that are sufficiently objective to be used by any institution. The Charts cover a rubric for the technological capabilities of a institution and the level of professional development in support and administrative staff.<sup>8</sup> Although, the indicators that will be produced as part of the MyMate assessment protocol will be more focussed in terms of the use of technology, the assessment of end users' readiness will be no less thorough and all-encompassing. The Star chart system has been tried and tested across the US and has proven a reliable and practical form of data assessment.

### 3.4.2 Socio-Economic and Organisational Factors

Considerations of the motivational factors around the use of technologies with any target group often focus on the need to motivate the primary user to engage effectively with the technology. However, in so doing, we forget or rather assume that support and administration staff often have considerable difficulties in adapting to advances in technology themselves and need the requisite level of computer literacy for the implementation to be successful. Logistical barriers such as lack of technical support are also of concern to support institutions. Newhouse, Trinidad & Clarkson<sup>9</sup> offer an excellent 4 part rubric for judging the "capabilities and feelings" around support staff (in this case teachers) reactions to the use of ICT. This assessment of capabilities and feelings is in turn divided into 6 key measures of a professional's preparedness for effectively utilizing ICT.<sup>10</sup>

The first conclusion to be drawn from the research we have undertaken is that concerns of socio-economic and organisational impact have been largely ignored in the projects studied due to a focus on the social and experiential value of such projects in the past, or due to the fact that very few projects of this sort have actually been tried. As such it has not been possible to learn too much about the practical difficulties involved. This is largely due to the fact that the previous assessments carried out in these sorts of projects was undertaken by the designers of the technology and with a full understanding of the logistical requirements and necessary resources, motivation and commitment to the aims of the project. These advantages however, will not be shared by the tertiary users in MyMate.

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<sup>7</sup> *School Technology and Readiness – Year 3 Report*, Produced by CEO Forum on Education and Technology, CEO Forum website (<http://www.ceoforum.org/>)

<sup>8</sup> *CEO Forum – School Technology and Readiness Chart*, Produced by CEO Forum on Education and Technology, CEO Forum website (<http://www.ceoforum.org/>)

<sup>9</sup> Newhouse Paul, Trinidad Sue, Clarkson Barney, p.13 *Teacher Professional ICT Attributes A Framework*, Published by Specialist Educational Services Perth, Western Australia, 2002, Department of Education and Training website - <http://www.det.wa.edu.au/>

<sup>10</sup> Newhouse Paul, Trinidad Sue, Clarkson Barney

### 3.5 Conclusions

The main conclusion to be drawn from our research is the lack of precedents for the assessment to be carried out in this deliverable. Indeed, from those technology projects addressing social issues studied, questions of socio-economic and organisational impact of technology (as defined in this deliverable) are generally ignored or given limited importance. However, the study of other less directly related projects has proved very useful in identifying the objectives outlined in Section 5.

### 3. SCOPE OF THE CONSULTATION

#### 4.1 Overview

Before delineating the specific objectives for the consultation process it is important to identify the broader scope of the consultation we will run. The focus for the consultation will be to feed into the design of the MyMate technology and, specifically, to develop a set of game proposals upon which the MyMate technology can be based.

#### 4.2 Areas of assessment

We need to revisit the fundamental aim and purpose of the MyMate solution and how it will work in practice. This means addressing some or all of the following questions:

- What level of commitment can we expect from volunteer secondary users?
- How might we reward secondary users?
- How will effective relationships be built between primary, secondary and tertiary users and how will these relationships be monitored and managed?
- Specifically, how will the initial relationship between primary and secondary user be established?
- What is the profile of a secondary user and what types of activities will they or should they need to take part in?
- What are the limits of influence that secondary users need to work under and how will these limits be enforced?
- Are there ethical or other issues that relate to secondary users playing a role in primary users taking medication?
- What are the dangers that might emerge through using this technology and how can we mitigate these dangers?
- Is there variation in the approach from country to country and how will we, as a consortium, account for that?
- How might we/tertiary users 'match' secondary users to primary users? What are the parameters of this matching? Do we need to take account of issues of gender, race, religion, language, interests etc.? Could a primary user have more than one 'mate'?
- What constitutes good practice in relation to the interactions and activities that secondary users will undertake and how do we propose to educate and train these users in these good practices?
- What are the reporting requirements for tertiary users in terms of the data and feedback that they will need to gather from both primary and secondary users?
- How will primary users provide feedback on their experiences with secondary users?
- What is the procedure for dealing with validating secondary users (and addressing any issues that may arise in the behaviour of secondary users)?
- What are the qualification criteria for inclusion/exclusion amongst primary and secondary users?

- What will the process of recruitment look like and how might tertiary users recruit suitable candidates to be part of the programme?
- What level of training would secondary users need prior to them engaging directly with primary users?
- Are there any barriers in relation to the use of technology amongst secondary users and how might these barriers be overcome?

In addition to surveying primary and secondary users on their reaction to specific game scenarios (which we will develop as part of our work in Valencia), we will also need to survey them more generally on their views and feelings towards the MyMate idea. This may include some or all of the following questions:

For Primary end users:

- What is your view of the MyMate idea (particularly in relation to the idea of a secondary user coming into your home to help you with specific tasks)?
- What types of tasks would you be comfortable getting help with from a secondary user (i.e. someone who is not medically trained but is a volunteer)?
- What types of tasks would you not be comfortable with in relation to secondary users operating within the MyMate programme?
- What type of secondary user would you most likely to feel happy and confident with (in terms of profile/type/gender/age etc.)?
- Are there any types of secondary user that you would not be comfortable with?

For Secondary end users:

- What level of commitment would you be willing volunteer to the programme? How much time would you be willing to give to the programme?
- What type of rewards would motivate you to take part?
- What is your experience and expertise in relation to the use of mobile and app-based technology?
- How comfortable are you with using apps?
- Have you ever played online or mobile games and what is your view of these games?
- What type of activities would you be willing to take part in when it comes to helping and engaging with primary end users?
- What type of activities would you perceive to be beyond your experience/expertise/ability?
- What are the practical barriers that you might perceive would get in the way of you performing your role within the programme?
- What factors would stop you from taking part in the programme?

The final tools for engaging with primary and secondary users around the MyMate technology will be developed by the consortium at the Valencia meeting and in subsequent conversations.

We will also agree on a timescale for undertaking the assessment and the process around data collection and reporting.

### 4.3 The Consultation Process

Our suggestion is that the first stage of consultation will involve deep engagements – utilising focus groups – with participating user centres (i.e. tertiary end users). This will then inform further interactions with primary and secondary users, interactions that will be led by the participating user centres.

Tertiary users will feed into the design of questions for primary and secondary users when we meet with them in Spain in February. Once that engagement has been completed, the questions will be refined and then added in to this document.

## 4. THE CONSULTATION PROTOCOLS

### 5.1 Initial Focus Group Guidelines

As set out in Section 4, the initial approach to completing the user consultation exercise will be to run a series of focus groups with the user centres who are currently partners within the consortium. The purpose of these focus groups will be threefold:

First, we will seek to answer some specific questions in relation to the design, use and implementation of the MyMate technology in order to inform the design of the technology and the way in which it is developed.

Second, we will co-design the consultation process that user centres will run themselves with primary and secondary users in their own countries.

Third, we will develop a first iteration of the game scenarios which we intend to use as a basis for the MyMate application. These scenarios can then be tested by the user centres during their own consultation process with primary and secondary users.

For each focus group the following rules and guidelines should be applied:

- The focus group should be a small group of between six and ten people led through an open discussion by a skilled moderator. The group needs to be large enough to generate rich discussion but not so large that some participants are left out.
- The focus group moderator needs to nurture and encourage the discussion in an open and spontaneous format. The moderator's goal is to generate a maximum number of different ideas and opinions from as many different people in the time allotted.
- The ideal amount of time to set aside for a focus group is anywhere from 45 to 90 minutes. Beyond that most groups are not productive and it becomes too demanding on participant time.

- Focus groups are structured around a set of carefully predetermined questions – usually no more than 10 – but the discussion should be free-flowing. Ideally, participant comments will stimulate and influence the thinking and sharing of others. Some people even find themselves changing their thoughts and opinions during the group.
- The ideal is to have a homogeneous group of strangers involved in the focus group. Homogeneity levels the playing field and reduces inhibitions among people who will probably never see each other again.
- It takes more than one focus group on any one topic to produce valid results – usually three or four. Due to the ground that we need to cover, it may be best to run each of the focus groups below twice or three times with a different audience involved each time.
- Focus group participants won't have a chance to see the questions they are being asked. So, to make sure they understand and can fully respond to the questions posed, questions should be:
  - o Short and to the point
  - o Focused on one dimension each
  - o Unambiguously worded
  - o Open-ended or sentence completion types
  - o Non-threatening or embarrassing
  - o Worded in a way that they cannot be answered with a simple "yes" or "no" answer (use "why" and "how" instead)
- There are three types of focus group questions:
  - o *Engagement questions*: introduce participants to and make them comfortable with the topic of discussion
  - o *Exploration questions*: get to the meat of the discussion
  - o *Exit question*: check to see if anything was missed in the discussion
- A focus group is not:
  - o A debate
  - o Group therapy
  - o A conflict resolution session
  - o A problem solving session
  - o An opportunity to collaborate
  - o A promotional opportunity
  - o An educational session
- Participant inclusion/exclusion criteria should be established upfront and based on the purpose of the study. Use the criteria as a basis to screen all potential applicants.
- Once a group of viable recruits has been established, call each one to confirm interest and availability. Give them times and locations of the focus groups and secure verbal confirmation. Tell them you will mail (or email) them a written confirmation and call to remind them two days before the scheduled group.

- Tell participants that the focus group will take about one and half to two hours. Give them a starting time that is 15 minutes prior to the actual start of the focus group to allow for filling out necessary paperwork and settling in to the group.
- Arrange for a comfortable room in a convenient location. The room should have a door for privacy and table and chairs to seat a circle of up to 12 people.

### Conducting the focus group

- Ideally, the focus group is conducted by a team consisting of a moderator and assistant moderator. The moderator facilitates the discussion; the assistant takes notes and runs the tape recorder.
- The ideal focus group moderator has the following traits:
  - o Can listen attentively with sensitivity and empathy
  - o Is able to listen and think at the same time
  - o Believes that all group participants have something to offer no matter what their education, experience, or background
  - o Has adequate knowledge of the topic
  - o Can keep personal views and ego out of the facilitation
  - o Is someone the group can relate to but also give authority to
  - o Can appropriately manage challenging group dynamic
- The assistant moderator must be able to do the following:
  - o Run a tape recorder during the session
  - o Take notes in case the recorder fails or the tape is inaudible
  - o Note/record body language or other subtle but relevant clues
  - o Allow the moderator to do all the talking during the group
- Both moderator and assistant moderator are expected to welcome participants and direct them in completing pre-group paperwork.
- At a minimum, all participants should complete a consent form which should be administered before the focus group begins.
- The moderator uses a prepared script to welcome participants, remind them of the purpose of the group and also sets ground rules.

## FOCUS GROUP INTRODUCTION

### WELCOME

Thanks for agreeing to be part of the focus group. We appreciate your willingness to participate.

### INTRODUCTIONS

Moderator; assistant moderator

### PURPOSE OF FOCUS GROUPS

We have been asked by \_\_\_\_\_ to conduct the focus groups.

The reason we are having these focus groups is to find out \_\_\_\_\_.

We need your input and want you to share your honest and open thoughts with us.

### GROUND RULES

#### 1. WE WANT YOU TO DO THE TALKING.

We would like everyone to participate.

I may call on you if I haven't heard from you in a while.

#### 2. THERE ARE NO RIGHT OR WRONG ANSWERS

Every person's experiences and opinions are important.

Speak up whether you agree or disagree.

We want to hear a wide range of opinions.

#### 3. WHAT IS SAID IN THIS ROOM STAYS HERE

We want folks to feel comfortable sharing when sensitive issues come up.

#### 4. WE WILL BE TAPE RECORDING THE GROUP

We want to capture everything you have to say.

We don't identify anyone by name in our report. You will remain anonymous.

- Before asking the first focus group question, an icebreaker can be inserted to increase comfort. Example: "If you had a limitless budget, where would you go on holiday?"
- The focus group moderator has a responsibility to adequately cover all prepared questions within the time allotted. S/he also has a responsibility to get all participants to talk and fully explain their answers. Some helpful probes include:
  - o "Can you talk about that more?"
  - o "Help me understand what you mean"
  - o "Can you give an example?"
- It is good moderator practice to paraphrase and summarize long, complex or ambiguous comments. It demonstrates active listening and clarifies the comment for everyone in the group.
- Because the moderator holds a position of authority and perceived influence, s/he must remain neutral, refraining from nodding/raising eyebrows, agreeing/disagreeing, or praising/denigrating any comment made.

- A moderator must tactfully deal with challenging participants. Here are some appropriate strategies:
  - o *Self-appointed experts*: "Thank you. What do other people think?"
  - o *The dominator*: "Let's have some other comments."
  - o *The rambler*: Stop eye contact; look at your watch; jump in at their inhale.
  - o *The shy participant*: Make eye contact; call on them; smile at them.
  - o *The participant who talks very quietly*: Ask them to repeat their response more loudly.
- When the focus group is complete the moderator thanks all participants.
- Immediately after all participants leave, the moderator and assistant moderator debrief while the recorder is still running and label all tapes and notes with the date and time.

### Analysing the data

- In order for all participant comments to be understandable and useful, they must be boiled down to essential information using a systematic and verifiable process. Begin by transcribing all relevant parts of the focus group recordings and inserting notes into transcribed material where appropriate.
- Clean up transcripts by stripping off nonessential words.
- Look for common themes in the responses for each question.
- Write a short paragraph summarising findings for each question and add quotes to illustrate key points where appropriate.

### 5.2 Specific focus group questions and accompanying questionnaires

For each of the focus groups that you will run, you need to follow a broad structure of questions that have been designed to address all key issues in relation to the MyMate solution. Remember that the ultimate purpose of this activity is to create feedback and ideas that will inform the development of the MyMate technology.

For each focus group, the guidance questions below should enable you to have an open dialogue with participants, stimulating their thinking and generating views and opinions. In addition, each focus group is accompanied by a questionnaire which will need to be completed by every focus group participant. These questionnaires will also be shared more widely with others who are not taking part in the focus groups.

The focus group questions and questionnaires are grouped together below according to the three types of user you will need to survey – primary users (that is those who will benefit directly from the MyMate solution); secondary users (that is the elderly volunteer carers who will use the MyMate technology); and tertiary users (that is the elderly care centres who are responsible for the wellbeing of primary users).

### 5.2.1 Focus Group Session 1: Specific questions in relation to the use of the MyMate technology within the intended context – FOR TERTIARY USERS

The following questions are grouped together and are designed to be guidance questions for the focus groups to be run with elderly care professionals working within the designated user centres. Participants in the focus group should be shown the two introductory videos before the discussion begins.

Selection of the participants in this focus group should be made on the basis of finding individuals who have good experience within an elderly care setting (i.e. not new hires) and those who you believe have strong opinions about how we can better help address the issues that face elderly people in their own homes.

For each user centre participating in the consultation, there should be a minimum of 5 representatives of the tertiary centre who take part in the focus group and questionnaire consultation. In addition, each user group should disseminate the questionnaire to a minimum of 10 other representatives of tertiary centres outside of their own (and ideally in countries not represented within the consortium).

The questionnaire that accompanies this will cover the same topics but with mainly closed questions:

About the MyMate concept:

- What do you think of the MyMate concept? Are there any issues you see with implementing MyMate with seniors under your care?
- How will effective relationships be built between primary, secondary and tertiary users and how will these relationships be monitored and managed? Specifically, how will the initial relationship between primary and secondary users be established?
- How might we/tertiary users 'match' secondary users to primary users? What are the parameters of this matching? Do we need to take account of issues of gender, race, religion, language, interests etc.? Could a primary user have more than one 'mate'?
- What are the dangers that might emerge through using this technology and how can we mitigate these dangers?
- What are the reporting requirements for tertiary users in terms of the data and feedback that they will need to gather from both primary and secondary users?
- What will the process of recruitment look like and how might tertiary users recruit suitable candidates to be part of the programme?
- What will the organisational challenges be for elderly care centres in using the MyMate technology?

About Primary Users

- What is the typical profile of primary end users to be included within the MyMate project?

- What are the qualification criteria for inclusion/exclusion of primary users on the MyMate project?
- How will primary users provide feedback on their experiences with secondary users?

### About Secondary Users

- What are the qualification criteria for inclusion/exclusion of secondary users on the MyMate project? What is the profile of a secondary user and what types of activities will they or should they need to take part in? What level of commitment can we expect from volunteer secondary users?
- How might we reward secondary users?
- What are the limits of influence that secondary users need to work under and how will these limits be enforced?
- Are there ethical or other issues that relate to secondary users playing a role in primary users taking medication?
- What constitutes good practice in relation to the interactions and activities that secondary users will undertake and how do we propose to educate and train these users in these good practices?
- What is the procedure for dealing with validating secondary users (and addressing any issues that may arise in the behaviour of secondary users)?
- What level of training would secondary users need prior to them engaging directly with primary users?
- Are there any barriers in relation to the use of technology amongst secondary users and how might these barriers be overcome?

### About MyMate activities and the impact we hope to have

- Our intention is that the MyMate project will explore the value of the solution for improving social and psychological wellbeing and capabilities. Based on your understanding of MyMate, what do you think about this focus and how effective might MyMate be in addressing these challenges?
- Part of the MyMate approach may relate to addressing mild depression, anxiety and apathy particularly in those who are isolated in their own homes. What is your response to this idea and do you think it will work?
- A key focus for the activities that secondary and primary users will engage in will be social. By increasing the socialization of primary users, we can impact positively on their wellbeing. Do you agree with this focus and what sort of activities would you include in this regard?
- Regarding the specific activities that secondary users may engage primary users in, the approach may also involve addressing executive functions, cognitive functions and physical activity. Do you agree with this focus and what sort of activities would you include in this regard?

- What will be the expected outcomes/impact for primary end users who participate in the MyMate project?

### 5.2.2 Questionnaire for Tertiary End Users

The following questionnaire should be completed by all participants in the focus group once the discussion has finished. Furthermore, this questionnaire can be shared with others not present at the focus group meetings and from tertiary institutions outside of the participating user centres:

Section A: About the MyMate concept:

A.1 Do you understand the MyMate concept?

(Please tick only one)

- It is clearly articulated and I understand the purpose of the solution
- I understand the main points of the MyMate concept
- I am not entirely clear in terms of my understanding of the concept

A.2 How simple do you think that implementing the MyMate solution will be?

(Please tick only one)

- MyMate will be easy to implement and I don't foresee any significant issues
- There may be some issues with implementation but I think these can be overcome
- There will be many issues with implementation that may be difficult/impossible to overcome (Please give details)

A.3 What are the problems or challenges that might emerge through using the MyMate solution?

- For primary users (Please give details)
- For secondary users (Please give details)
- For tertiary users (Please give details)

A.4 How can we mitigate these problems or challenges in the way that we design the solution?

- For primary users (Please give details)
- For secondary users (Please give details)
- For tertiary users (Please give details)

A.5 Do you think that the process of 'matching' secondary users to primary users will be problematic? If yes, why and how?

- No
- Yes (Please give details)

A.6 What factors do you think will be important in matching primary and secondary users?  
(Please tick all that apply)

- Gender
- Race
- Religion
- Language
- Interests
- Other (Please give details)

A.7 Do you think a primary user could or should have more than one 'mate'?

- Yes
- No (Please give details)

## Section B: About Primary Users

B.1 Which of the following primary end users should be considered for inclusion within the MyMate project?

(Please tick all that apply)

- Elderly people who are physically and mentally well and are living independently
- Elderly people who show signs of mild cognitive impairment and are living independently
- Elderly people who suffer from mild to moderate anxiety or depression and are living independently
- Elderly people who have mild physical impairments (i.e. arthritis/partial deafness/problems with vision) and are mentally well and are living independently
- Elderly people who have mild physical impairments (i.e. arthritis/partial deafness/problems with vision) and are mentally well and are living independently
- Elderly people who are living independently and have been identified as being socially excluded
- Elderly people who live with their partner or spouse
- Elderly people who are living independently within a residential care setting
- Other (Please give details)

B.2 Do tertiary end users need to collect feedback from primary users?

- Yes (if Yes, please answer question 2.3 and 2.4)
- No

B.3 Which of the following aspects of the MyMate experience would you expect tertiary users to be able to monitor in terms of data and feedback from primary users?

(Please tick all that apply)

- General health and wellbeing of the primary user
- Perception of change in health and wellbeing of the primary user
- Level of satisfaction of primary user in relation to the efforts of the secondary user
- Time spent by secondary user completing their interaction with a primary user
- Activities additional to those which the secondary user has been required/requested to perform
- The relationship between the primary and the secondary user
- Other (Please give details)

B.4 Which methods of data/feedback collection should be used with primary users?

(Please tick all that apply)

- Through a specific function within the mobile/tablet-enabled app
- Through direct telephone contact between the primary and tertiary users
- Through direct face to face contact between the primary and tertiary users
- Other (Please give details)

## C About Secondary Users

C.1 Which of the following do you think will be important to consider when recruiting secondary users onto the MyMate programme?

(Please tick all that apply)

- The attitude of the candidate
- The physical health of the candidate
- The mental health of the candidate
- Relevant experience of the candidate
- The location of the candidate
- The level of time the candidate is willing to commit
- The interests of the candidate
- The relevant skills (communication/cognitive/other) of the candidate
- Other (Please give details)

C.2 Which of the following aspects of the MyMate experience would you expect tertiary users to be able to monitor in terms of data and feedback from secondary users?

(Please tick all that apply)

- General health and wellbeing of the primary user
- Perception of change in health and wellbeing of the primary user
- Level of social interaction from primary user

- Level of satisfaction of primary user in relation to the efforts of the secondary user
- Time spent by secondary user completing their interaction with a primary user
- Activities additional to those which the secondary user has been required/requested to perform
- The relationship between the primary and the secondary user
- Other (Please give details)

C.3 What level of time commitment can we expect from volunteer secondary users?  
(Please tick only one)

- Up to 1 hour per week
- 2-4 hours per week
- 4-8 hours per week
- More than 8 hours per week

C.4 How might we reward secondary users?  
(Please tick only one)

- They don't require a reward, giving back to society is enough
- Some direct financial reward or gift
- Opportunity to earn 'loyalty points' that can be exchanged for goods
- Other (Please give details)

C.5 What areas do you think secondary users will need to be trained in to ensure good practice?  
(Please tick all that apply)

- Basic communication skills
- Basic first aid
- Use of all aspects of the MyMate technology
- Basic understanding of mild cognitive illness/mental health problems
- Basic understanding of the problems and signs of social isolation
- Other (Please give details)

C.6 How long do you think the initial training of secondary users will take?  
(Please tick only one)

- 2-4 hours
- 1 day
- 1-3 days
- More than 3 days

C.7 How should tertiary users monitor secondary users and address any issues that may arise in the behaviour of secondary users?

(Please tick all that apply)

- Through analysis of primary user feedback
- Through a specific function within the mobile/tablet-enabled app
- Through regular telephone contact between the secondary and tertiary users
- Through regular face to face contact between the secondary and tertiary users
- Other (Please give details)

Section D: Regarding MyMate activities and the impact we hope to have

D.1 Which of the following do you think would be legitimate activities for secondary users to undertake with primary users?

(Please tick all that apply)

- Engage in conversation
- Play card or board games (like Scrabble)
- Go for a walk
- Watch a film
- Listen to music
- Read together
- Visit a sporting or cultural event
- Play a cognitive/memory game
- Watch television
- Use the internet
- Go shopping
- Cook
- Complete household tasks (like cleaning)
- Help with practical things like banking or insurance
- Go for a drive
- Play sports (like tennis)
- Talk about medical problems
- Check that primary user has taken medication
- Go to a medical appointment (at a hospital or doctor's surgery)
- Other (Please give details)

D.2 Our intention is that the MyMate project will explore the value of the solution for improving social and psychological wellbeing and capabilities. Based on your understanding of MyMate, how effective might MyMate be in addressing these challenges?

(Please tick only one)

- Not at all effective

- Moderately effective
- Effective
- Highly effective

Please give reasons below for your answer:

D.3 Part of the MyMate approach may relate to addressing mild depression, anxiety and apathy particularly in those who are isolated in their own homes. Based on your understanding of MyMate, how effective might MyMate be in addressing these challenges?

(Please tick only one)

- Not at all effective
- Moderately effective
- Effective
- Highly effective

Please give reasons below for your answer:

D.4 A key focus for the activities that secondary and primary users will engage in will be social. By increasing the socialization of primary users, we can impact positively on their wellbeing. Based on your understanding of MyMate, how effective might MyMate be in addressing these challenges?

(Please tick only one)

- Not at all effective
- Moderately effective
- Effective
- Highly effective

Please give reasons below for your answer:

### 5.2.3 Focus Group Session 2: The consultation process that user centres will run themselves with primary users in their own countries

Selection of the participants in this focus group should be made on the basis of bringing together primary users that are likely to be the target beneficiaries of the MyMate technology. At this stage, this means elderly people who are living independently and who are at risk of – or experiencing – social exclusion/loneliness/anxiety/depression etc.

For each user centre participating in the consultation, there should be a minimum of 10 representative primary end users who take part in the focus group and questionnaire consultation.

The following questions are designed to be guidance questions for the focus groups to be run with elderly people who are in need of support and may benefit from the MyMate solution. Participants in the focus group should be shown the introductory video relating to primary

users before the discussion begins. The questionnaire that accompanies this will cover the same topics but with mainly closed questions:

- Do you understand the MyMate concept? [If not, the moderator will need to give further explanation]
- What is your view of the MyMate idea (particularly in relation to the idea of a secondary user coming into your home to help you with specific tasks)?
- How do you think that having a MyMate 'friend' might be helpful or useful to you?
- What types of tasks and activities would you be comfortable getting help with from a secondary user (i.e. someone who is not medically trained but is a volunteer)? [The moderator here should talk about physical and mental tasks, games and leisure activities, assistance with household activities and so on]
- What types of tasks would you not be comfortable with in relation to secondary users operating within the MyMate programme? [See previous point – the primary user may need some prompting in terms of the types of activities]
- What type of secondary user would you most likely to feel happy and confident with (in terms of profile/type/gender/age etc.)? [We are particularly interested here in whether gender is an issue and also in whether shared interests are important between primary and secondary users]
- Are there any types of secondary user that you would not be comfortable with?
- Do you have any other comments about the MyMate idea that you would like to share?

#### 5.2.4 Questionnaire for Primary End Users

The following questionnaire should be completed by all participants in the focus group once the discussion has finished. Furthermore, this questionnaire can be shared with other primary end users not present at the focus group meetings:

A.1 Do you understand the MyMate concept?

(Please tick only one)

- It is clearly articulated and I understand the purpose of the solution
- I understand the main points of the MyMate concept
- I am not entirely clear in terms of my understanding of the concept

A.2 What is your view of the MyMate idea (particularly in relation to the idea of a secondary user coming into your home to help you with specific tasks)?

(Please tick only one)

- I feel comfortable about the MyMate idea and would be happy to take part
- I have mixed feelings about the MyMate idea and feel I would need more information
- I am not comfortable about the MyMate idea and would not take part
- Comments

A.3 How do you think that having a MyMate 'friend' might be helpful or useful to you?  
(Please tick all that apply)

- It would make me feel less lonely and isolated
- It would encourage me to be more physically active
- It would help me to be more mentally active
- It would help me to get things done
- It would not help me in any way
- Comments

A.4 What types of tasks would you be comfortable with in relation to secondary users operating within the MyMate programme?  
(Please tick all that apply)

- Engage in conversation
- Play card or board games (like Scrabble)
- Go for a walk
- Watch a film
- Listen to music
- Read together
- Visit a sporting or cultural event
- Play a cognitive/memory game
- Watch television
- Use the internet
- Go shopping
- Cook
- Complete household tasks (like cleaning)
- Help with practical things like banking or insurance
- Go for a drive
- Play sports (like tennis)
- Talk about medical problems
- Check that primary user has taken medication
- Go to a medical appointment (at a hospital or doctor's surgery)
- Other (Please give details)

A.5 What types of tasks would you not be comfortable with in relation to secondary users operating within the MyMate programme?  
(Please tick all that apply)

- Engage in conversation
- Play card or board games (like Scrabble)
- Go for a walk

- Watch a film
- Listen to music
- Read together
- Visit a sporting or cultural event
- Play a cognitive/memory game
- Watch television
- Use the internet
- Go shopping
- Cook
- Complete household tasks (like cleaning)
- Help with practical things like banking or insurance
- Go for a drive
- Play sports (like tennis)
- Talk about medical problems
- Check that primary user has taken medication
- Go to a medical appointment (at a hospital or doctor's surgery)
- Other (Please give details)

A.6 What types of secondary users would you like to be 'matched' with on the MyMate programme?

(Please tick all that apply)

- Someone like me
- Someone the same gender as me
- Someone who shares my interests
- Someone who shares my beliefs and values
- Someone who is a similar age to me
- I don't mind
- Other (Please give details)

A.7 Are there any types of secondary user that you would not be comfortable with?

(Please tick all that apply)

- Someone who is not the same gender as me
- Someone who does not share any of my interests
- Someone who does not share my beliefs or values
- Someone who is significantly different in age to me
- I don't mind
- Other (Please give details)

A.8 Do you have any other comments about the MyMate idea that you would like to share?

(Please give details)

### 5.2.5 Focus Group Session 3: The consultation process that user centres will run themselves with secondary users in their own countries:

Selection of the participants in this focus group should be made on the basis of bringing together secondary users that are likely to be the target users of the MyMate technology. At this stage, this means elderly people who are physically and mentally well and have the energy and commitment to give to the task of becoming an elderly volunteer carer.

For each user centre participating in the consultation, there should be a minimum of 20 representative secondary end users who take part in the focus group and questionnaire consultation. In addition, the questionnaire should be sent to at least 20 other secondary users who have not been involved in the focus groups (ideally from different countries).

Participants in the focus group should be shown the introductory video relating to both primary and secondary users before the discussion begins. The questionnaire that accompanies this will cover the same topics but with mainly closed questions:

#### About the MyMate Concept

- Do you understand the MyMate concept? [If not, the moderator will need to give further explanation]
- What is your view of the MyMate idea (particularly in relation to the idea of you, as a secondary user, going into the home of a primary user to help them with specific tasks)?
- How do you think that being a MyMate 'friend' might be helpful or useful to primary users?
- How do you think that being a MyMate 'friend' might be helpful or useful to you as a secondary user?
- If you were to become a MyMate 'friend', what type of primary end users would you like/would you feel comfortable helping?

#### About tasks and activities

- What types of tasks and activities would you be comfortable helping primary users with?
- What types of tasks would you not be comfortable helping primary users with? What type of activities would you perceive to be beyond your experience/expertise/ability?

#### About your role and commitment to the programme

- What level of commitment would you be willing volunteer to the programme? How much time would you be willing to give to the programme?
- What type of rewards would motivate you to take part?

#### About technology

- What is your experience and expertise in relation to the use of mobile and app-based technology?
- How comfortable are you with using apps?
- Have you ever played online or mobile games and what is your view of these games?

#### Generally

- What are the practical barriers that you might perceive would get in the way of you performing your role or completing your missions within the programme?
- What factors would stop you from taking part in the programme?
- Do you have any other comments, questions or ideas regarding the MyMate solution?

#### 5.2.6 Questionnaire for Secondary End Users

The following questionnaire should be completed by all participants in the focus group once the discussion has finished. Furthermore, this questionnaire can be shared with other secondary end users not present at the focus group meetings:

##### A.1 Do you understand the MyMate concept?

(Please tick only one)

- It is clearly articulated and I understand the purpose of the solution
- I understand the main points of the MyMate concept
- I am not entirely clear in terms of my understanding of the concept

##### A.2 What is your view of the MyMate idea (particularly in relation to the idea you, as a secondary user, going into the home of a primary user to help them with specific tasks)?

(Please tick only one)

- I feel comfortable about the MyMate idea and would be happy to take part
- I have mixed feelings about the MyMate idea and feel I would need more information
- I am not comfortable about the MyMate idea and would not take part
- Comments

##### A.3 How do you think that having a MyMate 'friend' might be helpful or useful to primary users?

(Please tick all that apply)

- It would make them feel less lonely and isolated
- It would encourage them to be more physically active
- It would help them to be more mentally active
- It would help them to get things done
- It would not help them in any way
- Comments

A.4 How do you think that being a MyMate 'friend' might be helpful or useful to you?  
(Please tick all that apply)

- It would make me feel like I was contributing something valuable
- It would give me a sense of purpose
- It would help me to remain active and engaged in my community
- It would not help me in any way
- Comments

A.5 What types of tasks would you be comfortable with completing as a secondary user within the MyMate programme?  
(Please tick all that apply)

- Engage in conversation
- Play card or board games (like Scrabble)
- Go for a walk
- Watch a film
- Listen to music
- Read together
- Visit a sporting or cultural event
- Play a cognitive/memory game
- Watch television
- Use the internet
- Go shopping
- Cook
- Complete household tasks (like cleaning)
- Help with practical things like banking or insurance
- Go for a drive
- Play sports (like tennis)
- Talk about medical problems
- Check that primary user has taken medication
- Go to a medical appointment (at a hospital or doctor's surgery)
- Other (Please give details)

A.5 What types of tasks would you not be comfortable with completing as a secondary user within the MyMate programme?  
(Please tick all that apply)

- Engage in conversation
- Play card or board games (like Scrabble)
- Go for a walk
- Watch a film

- Listen to music
- Read together
- Visit a sporting or cultural event
- Play a cognitive/memory game
- Watch television
- Use the internet
- Go shopping
- Cook
- Complete household tasks (like cleaning)
- Help with practical things like banking or insurance
- Go for a drive
- Play sports (like tennis)
- Talk about medical problems
- Check that primary user has taken medication
- Go to a medical appointment (at a hospital or doctor's surgery)
- Other (Please give details)

A.6 What types of primary users would you like to be 'matched' with on the MyMate programme?

(Please tick all that apply)

- Someone like me
- Someone the same gender as me
- Someone who shares my interests
- Someone who shares my beliefs and values
- Someone who is a similar age to me
- I don't mind
- Other (Please give details)

A.7 Are there any types of primary user that you would not be comfortable with?

(Please tick all that apply)

- Someone who is not the same gender as me
- Someone who does not share any of my interests
- Someone who does not share my beliefs or values
- Someone who is significantly different in age to me
- I don't mind
- Other (Please give details)

A.8 What level of time commitment do you think you would be happy to give to the MyMate programme?

(Please tick only one)

- Up to 1 hour per week
- 2-4 hours per week
- 4-8 hours per week
- More than 8 hours per week

A.9 What sort of rewards would you want/expect as a secondary user?  
(Please tick only one)

- I don't require a reward, giving back to society is enough
- Some direct financial reward or gift
- Opportunity to earn 'loyalty points' that can be exchanged for goods
- Other (Please give details)

A.10 What is your experience and expertise in relation to the use of mobile and app-based technology?  
(Please tick only one)

- I use a smart phone to access apps every day
- I have a smart phone but only use apps occasionally
- I have a smart phone but I only use it for calls and texts
- I have a mobile phone but it is not a smart phone
- I don't own a mobile phone
- Other (Please give details)

A.11 How comfortable are you with using apps?  
(Please tick only one)

- I am very comfortable using apps
- I'm fine with apps although I need to improve
- I don't feel particularly confident in using apps although I have tried
- I don't use apps although I am keen to learn
- I don't use apps and I am not confident I could learn
- Other (Please give details)

A.12 Have you ever played online or mobile games and what is your view of these games?  
(Please tick only one)

- I play online/mobile games regularly and enjoy them
- I occasionally play online/mobile games and enjoy them when I do
- I never play online/mobile games but I am keen to try
- I never play online/mobile games and have no interest in trying
- Other (Please give details)

A.13 What are the practical barriers that you might perceive would get in the way of you performing your role or completing your missions within the programme?

(Please tick only one)

- Lack of time
- Use of the technology
- Lack of motivation
- Problems in the relationship with primary users
- Loss of interest
- Cost of taking part
- Other competing commitments
- Other (Please give details)

A.14 Do you have any other comments, questions or ideas regarding the MyMate solution?

(Please specify here)

### 5.3 Protocols for first end user engagements at Month 12

A key element for the development of MyMate is the continued engagement with potential users and, as discussed at the consortium meeting in September 2016, following the initial user engagement activities, further work would be beneficial to explore and consult specifically on the mission scenarios. It was agreed that all the user centres will run a series of focus groups to help to review, develop and inform the mission scenarios for MyMate.

Below are instructions and guidance for undertaking the focus groups which will help to ensure consistency in reporting and further analysis of the outcomes.

#### 5.3.1 Focus Group Session Plan

The main objective of the focus groups will be to obtain feedback on the ten sample mission scenarios that have been circulated. Each group should have the opportunity to review and reflect on the mission scenarios and then openly discuss and offer opinions.

Primary, secondary and tertiary users should each have their own focus groups and suggested questions will be tailored accordingly.

It would be preferable to engage with users who have not previously been involved in the MyMate focus groups. With this in mind, time should be allowed at the beginning of the sessions for the groups to view the introductory videos with a brief explanation to ensure that all participants have understood the concept.

The outline for the focus groups should be as follows:

Number of participants: Minimum 5 – maximum 10

Duration: 2 hours per group

Format: Introduction to the MyMate concept with further explanation if required.

Explanation of the objective of the session - to obtain feedback on suggested mission scenarios.

Presentation of mission scenario slides.

Group discussion guided by moderator with open questions.

Data should be collated regarding the profile of all primary and secondary users if possible. This should include demographic data, simple data on health and any other relevant information.

Following each focus group, there will be a debrief session between the moderators at each user centre and partner White Loop who will be overseeing all focus groups and gathering data from all three user centres. Time in the schedule should be built in for these debrief sessions.

### 5.3.2 Specific focus group questions

For each of the focus groups, we need to follow a broad structure of questions that have been designed to address issues around the mission scenarios. The ultimate purpose of this activity is to create feedback and ideas that will inform the development of the MyMate technology.

For each focus group, the guidance questions below should enable an open dialogue with participants, stimulating their thinking and generating views and opinions.

In addition to these questions – which are ‘generic’ – there are also a set of questions that are specific to each of the missions and are listed on the mission scenario slides. These questions should be used in tandem with the questions outlined below.

The focus group questions are grouped together below according to the three types of user you will need to survey – primary users (that is those who will benefit directly from the MyMate solution); secondary users (that is the elderly volunteer carers who will use the MyMate technology); and tertiary users (that is the elderly care centres who are responsible for the wellbeing of primary users).

#### 5.3.2.1 Focus Group Session 1: FOR PRIMARY USERS

Selection of the participants in this focus group should be made on the basis of bringing together primary users that are likely to be the target beneficiaries of the MyMate technology. This means elderly people who are living independently and who are at risk of – or experiencing – social exclusion/loneliness/anxiety/depression etc.

For each user centre participating in the consultation, there should be 10 representative primary end users who take part in the focus groups.

The following questions are designed to be guidance questions for the focus groups to be run with elderly people who are in need of support and may benefit from the MyMate solution. Participants in the focus group should be shown the mission scenarios before the discussion begins.

Suggested questions (in addition to the mission-specific questions):

*Do you understand the mission scenarios? [If not, the moderator will need to give further explanation]*

*If you were using MyMate and selecting a mission, which would you be most likely to choose? Please give reasons.*

*Are there any of the other mission scenarios that particularly appeal to you? Please give reasons.*

*Are there any of the mission scenarios that you would be unlikely to engage in? Please give reasons.*

*Are there any of the mission scenarios that would definitely not engage in? Please give reasons.*

*Do you think the time allowed on the mission scenarios is about right? Are there any in particular that you think may take significantly longer, for example?*

*Are there any other activities that you feel could be included as alternative mission scenarios?*

*Do you have any other comments on the mission scenarios that you would like to share?*

*Do you have any other comments generally about the MyMate idea that you would like to share?*

### **5.3.2.2 Focus Group Session 2: FOR SECONDARY USERS**

Selection of the participants in this focus group should be made on the basis of bringing together secondary users that are likely to be the target users of the MyMate technology. This means people who are physically and mentally well and have the energy and commitment to give to the task of becoming an elderly volunteer carer.

For each user centre participating in the consultation, there should be 10 representative secondary end users who take part in the focus group.

The following questions are designed to be guidance questions for the focus groups to be run with potential elderly volunteer carers for the MyMate solution. Participants in the focus group should be shown the mission scenarios before the discussion begins.

Suggested questions (in addition to the mission-specific questions):

*Do you understand the mission scenarios? [If not, the moderator will need to give further explanation]*

*Are there any of the mission scenarios that you would be unwilling to engage in? Please give reasons*

*Are there any of the mission scenarios that particularly appeal to you? Please give reasons.*

*Are there any mission scenarios that you feel are inappropriate or should not be included? Please give reasons.*

*Do you think the time allowed on the mission scenarios is about right? Are there any in particular that you think may take significantly longer, for example?*

*Do you think different scenarios should have different rewards, for example according to time spent?*

*Are there any other activities that you feel could be included as alternative mission scenarios?*

*Do you have any other comments on the mission scenarios that you would like to share?*

*Do you have any other comments generally about the MyMate idea that you would like to share?*

### **5.3.2.3 Focus Group Session 3: FOR TERTIARY USERS**

Selection of the participants in this focus group should be made on the basis of finding individuals who have good experience within an elderly care setting and those who you believe have strong opinions about how we can better help address the issues that face elderly people in their own homes.

For each user centre participating in the consultation, there should be a minimum of 5 representatives of the tertiary centre who take part in the focus group.

The following questions are designed to be guidance questions for the focus groups to be run with elderly care professionals. Participants in the focus group should be shown the mission scenarios before the discussion begins.

Suggested questions (in addition to the mission-specific questions):

*Do you understand the mission scenarios? [If not, the moderator will need to give further explanation]*

*Are there any of the mission scenarios that you feel are inappropriate or should not be included? Please give reasons*

*Do you envisage any practical challenges around any of the mission scenarios? Please give reasons.*

*Are there any of the mission scenarios that you feel secondary users would not be prepared to engage in? Please give reasons*

*Which of the mission scenarios do you think would be most popular, amongst primary users, and amongst secondary users? Please give reasons*

*Which of the mission scenarios do you feel would be most beneficial to the psychological well-being of the primary users? Please give reasons.*

*The aim is to provide a good selection of activities; social, cognitive and physical. Do you think this has been achieved?*

*Do you think the time allowed on the mission scenarios is about right? Are there any in particular that you think may take significantly longer, for example?*

*Are there any other activities that you feel could be included as alternative mission scenarios?*

*Do you have any other comments on the mission scenarios that you would like to share?*

*Do you have any other comments generally about the MyMate idea that you would like to share?*

*What do you think about the requirement to manage these missions?*

*Are you comfortable with the time and resources required to manage the MyMate experience?*

*Do you have any concerns regarding the completion of these missions and the impact that these missions will have on primary users?*