PaletteV2

Projet progress report October 2016 – March 2017

05 October 2017
HUG, Vilans, Siveco, KempenLIFE, University of Bucharest, Smart Homes

Version	Description	Date	Contributor
0.1	Initial Draft	March 2017	HUG
0.2	Vilans contribution		VILANS
0.3	Reflexion contribution		REFLEXION
0.3	SIVECO contibution		SIVECO
0.5	SMH contribution		SMH
0.6	KEMP contribiution		KEMP
0.7	PPI contribution		PPI
0.8	UOB contribuition		UOB
1	Finalization	October 2017	HUG

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WP1 Coordination

The objective of this work package is to ensure that the project meets its objectives within budget and scheduled timescales. Tasks will include monitoring project progress, tracking deliverables and reporting back to the consortium. The project coordinator will also report to the EC and will be responsible for management and progress reports, costs statements, and the final project report to the EC. The project coordinator will collaborate with the other partners to effectively monitor and coordinate the project in administrative, technical and financial terms; to manage the knowledge generated by the project and to monitor quality and timing of project results by resolving any internal conflicts that might appear. Vilans is the Dutch national coordinator for PaletteV2 and worked on the contracts and payments of ZonMw.

Summary

[SMH] Main activities of Smart Homes in this workpackage are related to the alignment of the work carried out in workpackage 3 that Smart Homes leads with the other workpackages of the project and project administration.

[KEMP] Main activities of KempenLIFE in this workpackage are related to general activities to project administration and financial management.

[UOB]UB delivered the two (M6, M12) scheduled project progress reports on time (including this one) and participated in the financial reports by sending the requested data.

[SIVECO] The tasks performed by SIVECO in this workpackage 1 :

- Workshop face to face meeting - business plan

- Recording project costs

- Verify whether the expenditure fits in the project budget

- Preparing monthly information in order to report quarterly

- Procedure for acquisition of financial audit services

- Validation of Amendment 1 at the Contract

[HUG]

Exclusion of SSW

Following the end of activity of SSW in august and their refusal to collaborate, an amendment to the consortium has been created in order to exclude SSW from the consortium. This amendment has been validated by the consortium. Following the exclusion of SSW, an active search for alternate partners have started. Each partner have looked for potential partner. After evaluation, the Pozana Supercomputing National Center (PSNC) has been identified as the most likely partners to join the consortium. The coordinator has then started negotiation in order to evaluate the feasibility of the inclusion of such partner. Once an agreement found a new repartition of work has been discussed in order to reflect the current situation of the project. More specifically MM have been shifted from the end user requirement WP to the development WP.

Organisation of the Utrecht face to face meeting (17-18 January 2017)

The second face to face meeting PaletteV2 took place in Utrecht 7 and 8 April 2016 and was organized by Reflexion and VILANS. The logistic aspect has been organised by the LOC and the programme has been elaborated by the coordinator. At the end of the meeting the coordinator has summarized the decision taken during the meeting into the global follow up document.

Organisation of the biweekly conference call

Each second weeks, a conference call is organized in order to discuss the running administrative issues as well as the progress of the task. In order for these meeting to be efficient, the coordinator prepares an agenda containing all the issues that must be discussed. At the end of the meeting the coordinator prepares the minutes that contain all the decisions taken and the actions that must be undertaken by each partner.

Reimbursement of the costs associated with end user advisory board travel

Following the travel of the end advisory board in Bucharest the coordinator had to organize the reimbursement of the advisory board

Preparation of the month 6 project progress deliverable

In order to summarize the progress done during the 6 first months of the project the coordinator has collected

Task 1.1 Project coordination and administrative management

[SMH] Smart Homes has provided input to the coordinator for the yearly management report of the AAL CMU and provided Vilans, as Dutch national coordinator for PaletteV2, with the information needed for the yearly report for the Dutch NFA ZonMw.

Task 1.2 scientific and Technical management

[SMH] Smart Homes has attended the bi-weekly consortium telcos, the consortium meeting in Utrecht on 17 and 18 January 2017, and the consortium meeting on 17 and 18 May 2017 in Maribor.

Task 1.3 Financial management

[SMH] Smart Homes provided details on the finances for the AAL CMU and ZonMw.

Task 1.4 Project quality and assessment

[SMH] Smart has provided input for the 6-monthly progress report and established a close cooperation with the WP5 leader Vilans to ensure a seamless cooperation between these workpackages. Furthermore the Smart Homes Palette team has been extended with a technical experts to ensure a good transfer of knowledge between workpackage 3 and workpackage 4.

WP2 Dissemination, exploitation strategies and business case

Summary

[REFLEXION] In the WP2 all the task related elements as planned for the first half year have been achieved. We will report on the main aspects of this work package, consisting of the development of a dissemination and a business plan.

The web site

[PPI] The Palette V2 website is located at http://www.palettev2.eu/ in the registered domain PaletteV2.eu. Registration is under care of PPI. Design of the website is clean and simple to serve the purpose of offering initial project information and match the standards and requirements of AAL. It is in English at this point but will be amended with national webpages as soon as is will be required or needed.

Technology used for this web page design is Joomla 3.5. It is a free and open-source content management system (CMS) for publishing web content. It is built on a model–view–controller web application framework that can be used independently of the CMS.

The website is currently divided into 6 areas:

1. **Project Overview** to briefly present project goal.
2. **Project Partners**, where all involved partners are introduced (weblinks, logos)
3. **User Scenario**, where a current story of a community member is given and explaining his progress in life by using PaletteV2.
4. **Business Pages,** intended to provide further different kinds of commercialisation information (licensing, prices...) for business partners and commercial users (B2B, B2C).
5. **Focus Groups**, is intended to support with focus groups and with the implementation of ideas, solutions, examples, ...
6. **About AAL**, where the Active and Assistive Living programme is briefly presented.

Partner PPI administers the project website according to new events or situations in the project (additional features, partner change etc.). Administration access credentials (and thus ability to edit) are in hands of PPI and can be granted to other partners if the need occurs. It is foreseen to change website contents whenever it is required by dissemination, project or program authorities. The whole partnership under the dissemination lead decides about structure and content of website.

What is still left unfinished is the project logo which will be defined/designed as soon as consensus on the purpose and focus of solution is agreed.

[SMH] Main focus of Smart Homes in this period has been on establishing contact with end users. We have provided feedback to draft material for recruitment. In the following period it is crucial to continue to build a Palette user group that is willing to remain actively involved in the project. Furthermore as a result of the co-creation sessions other stakeholders can be approached. This activity is strongly linked with the evolvement of the Palette platform over time. Future dissemination possibilities are linked with the results of workpackage 3 in relation to end user requirements that have been collected in this period and can be disseminated in the upcoming period.

[KEMP] Main focus of KempenLIFE has been on establishing contact with end users. This activity is strongly linked with the evolvement of the PALETTEv2 platform over time. Future dissemination possibilities are linked with the results of workpackage 3 in relation to end user requirements that have been collected in this period and can be disseminated in the upcoming period.

[SIVECO] We are planning a press release in the next period to disseminate project specifications. Updating the dissemination plan.

Task 2.1 Dissemination strategy and Market analysis

The overall objective is to identify and reach stakeholders, including end users and the public, in order to raise their awareness regarding the project's activities and results. During T2.1 the partners aim to elaborate the consortium's strategy for dissemination activities and engaging stakeholders and also define present and future business areas based on market requirements and customer wishes. Considering customer-oriented user scenarios, a successful exploitation strategy should be compiled.

[REFLEXION] Concerning dissemination, the partners were expected to bring to bear on this subject their very different experiences and levels of expertise. In order to get an initial overview of these differences but also to gather some useful practical ideas, the WP2 lead partner (Mr. Joost Thissen of **Reflexion**) issued on 22 April 2016 a questionnaire that was answered during the month of May by all partners but one. Given the fact that this one partner was among the three Dutch research partners, we could simply assume that their input was more or less covered by the input of the other Dutch partners, most of which are specialised in user oriented needs and demands research and the development of solutions. The completed questionnaires were used by the WP leader to compile a summarizing overview in which the differences and similarities between partners with regard to dissemination were made visible (2-06-2016). All results (questionnaires, responses and summarizing overview) are available on our joint PaletteV2 work platform on Freedcamp.

[REFLEXION] The next step was to conceive a concept or basic dissemination plan that provides helpful ideas to the partners to build their own country and region specific action plan for dissemination in relation to the primary and secondary target groups as they have been specified in the project proposal and elaborated in more detail by the partners. To ensure a higher level of relevance for the project's planning of dissemination actions, the WP leader took into account information and documentation as used in other EU-programmes and projects, such as the Erasmus Plus (E+) initiative on the innovation of education. In recent years E+ has stretched it's focus for dissemination from merely `broadcasting the project message to an audience as wide and numerous as possible' into `making sure (and showing) that the project has a measurable impact on it's target users or audience'. This means that valorisation of solutions and a successful implementation of final products of a project in new environments has become the main purpose (in E+) of dissemination. Relevant recent documents on dissemination, like the E+ communication called `The Pyramid of Change' were uploaded to the PaletteV2 work platform in Freedcamp. This basic plan was provided by the WP leader at the end of June 2016.

[REFLEXION] From the basic dissemination plan, a more specific and (almost) ready to use dissemination planning template was derived, consisting primarily of a schematic table enabling the partners to describe their planned dissemination actions and to provide specific details about these actions and especially the intended effects on the target groups, in other words the expected impact. This template was provided to the partners via the PaletteV2 platform on 11 July 2016. However, a first practical test by the partners during the meeting in Bucharest (12-14-09-2016) revealed that this template needs some improvements or extensions. On the basis of that, the template will be improved before the end of October 2016 and after that moment, the partners will be able to plan and describe their dissemination actions by using the template. Some slight changes will then turn this template into a dissemination reporting tool, to be used for detailed documentation of what was achieved (impact) during the dissemination process.

[VILANS] Vilans wrote a scientific paper on PaletteV2 for the ISG 2016 conference in Nice, which was presented to an audience of approximately 70 experts in the AAL field from across the world. The paper is published as a 1 pager Journal paper in the International Journal of Gerontechnology.

[REFLEXION]Next actions:
1. Improving the dissemination action planning template (before the end of October 2016).
2. Deriving a reporting template from the planning template (before the end of October 2016).

3. Sharpening our understanding of the primary, secondary and tertiary stakeholders of PaletteV2 products and services, leading to a narrowed down definition of stakeholders per country/region (end of November 2016).
4. Formulating a dissemination strategy (per country) in view of the sharpened definition of stakeholders.
5. Planning and carrying out dissemination actions per country/region by all partners. Internal reporting in the partnership and learning from these actions December 2016 and ongoing)

[UOB] We adapted the strategy to the Romanian context and suggested different areas in which the dissemination should be useful in Romania: we contacted assurance companies and diverse online and print magazines, to promote the project.

Business plan development

[VILANS] Johan Vesseur of **Vilans** became the business director of PaletteV2 and works in close cooperation with Reflexion to increase the market potential of PaletteV2. Several workshops on business modelling were organized and held in Amsterdam and Bucharest. Furthermore, the business model canvas has been set up to gather an insight in the potential market of PaletteV2. Furthermore, business development became – in contrast to the original work plan – an iterative short cycled activity in chunks to ensure flexibility in the choice for potential business models throughout the project phases.

[REFLEXION]For business development the partners could hardly rely on their previous experiences with specific approaches and techniques. This is simply due to the fact that the user representing organisations and research institutions that form the partnership of PaletteV2, are not involved on a structural basis in sales or other commercial activity. In fact most of the partners are non-profit institutions, funded by their local and national authorities and by the various EU-programmes that offer financial support to their activities. Necessary elements in the commercialisation process for the products of PaletteV2, like price calculations, marketing, IPR development, business model creation etcetera, are no part of the core business of any partner, except for SIVECO (to some extent).

[REFLEXION] Therefore, creating a viable business model for the products of PaletteV2 constituted a considerable challenge right from the start. Having acknowledged that fact, the partnership was happy to learn via the coordinator that the AAL-programme itself offers support to their project partnerships in setting up their business models. A large group of PaletteV2 partners subscribed to a business development workshop that took place in Amsterdam on the 7th of June 2016 under the title *"How to build viable business models in AAL projects".* All the Dutch partners and the Swiss coordinator participated in this seminar, led by AAL business expert Mr. Arto Wallin and his colleague. Unfortunately for the Romanian, Slovenian and Polish partners the time and costs of travel and attendance were an obstacle to participate. Of course, the results of this meeting (working with business canvases to construct a business approach) were shared with the partners. However, after this first encounter with the canvas-technique and half a day of practice, partners did not feel secure already at using the method themselves independently, even though this first experience in the Amsterdam seminar was rated by all participating PaletteV2 partners as most useful.

[REFLEXION] Needless to say that both the coordinator and the WP2 Leader were happy to learn that the AAL-programme offers follow up support on the theme of business development. In such cases a project specific workshop will be offered. and the WP leader planned a session in combination with the already planned partnership meeting in Bucharest on 12 and 13 September. On 14 September 2016, Mr. Jukka Hemilä of the AAL-programme introduced the canvas method once again and took the whole group of partners through a workshop in which we got better acquainted with a number of relevant aspects of using these techniques.

[REFLEXION] In order to guide the implementation of a business plan for PaletteV2, the WP2 leader is planning to meet in the near future with the business director of the project (Mr. Johan Vesseur) for a kind of study day to work out details of one or more canvas applications to share this with the partners.
This work will benefit from the planning as mentioned under the dissemination actions to sharpen our definition of stakeholders.

[REFLEXION] Next actions:

1. Sharpening our understanding of the primary, secondary and tertiary stakeholders of PaletteV2 products and services, leading to a narrowed down definition of stakeholders per country/region (end of November 2016).
2. Tentative use of the canvas method by WP-leader (and business director) in order to provide examples of viable business approaches (before December 2016).
3. Launching a project internal discussion of a potential Palettev2 business approach on the basis of using the canvas-method (starting December 2016 and from then ongoing).
4. Formulating a business strategy (per country or egion) by using the canvas-method and taking into account the sharpened definition of stakeholders.

Task 2.3 Community of Practice

This is a critical task since the viability and future success of the PALETTEV2 proposition will depend on growing the user target base. The consortium will aim to involve tertiary users in particular in this user community.

[UOB] UB's contribution consists in creating a group of end users and maintaining the link to disseminate results within this community as well. So we shared the information about this project by translating and putting on posters, by organizing focus groups, and co-creation sessions.

Task 2.4 Dissemination of the project results

The successful dissemination of Project results will be supported by different materials such as project website, online and offline publications, newsletters, brochures etc. The website for the project will be defined in order to disseminate the knowledge obtained throughout the project and to create market awareness. Different dissemination activities and events involving relevant actors will be organized in the countries within the project, in order to present and promote the project activities. Beside the thematic dissemination activities, two dissemination conferences will be organized. The first conference will be organized in Switzerland and will have the role of officially launching the project and the second conference, organized in Romania, will be the final project event where all the project result will be disseminated to the interested stakeholders.

[SMH] The Palette project is included on the website of Smart Homes. The annual 2-day Home Automation & Smart Living Event of Smart Homes is a unique platform showing the latest technology and services for the home and care environment. For two days, the Evoluon in Eindhoven is devoted to communication, care, security, entertainment, audio & video, comfort, tele-medicine, energy management, infrastructure and much more. At the 2016 event, held on 16 and 17 November, the Palette platform was presented in the booth of Smart Homes via a wall where visitors could indicate their preference for the different thematic areas of Palette via voting and they could indicate their desires for the time after their retirement. The picture below shows the wall.
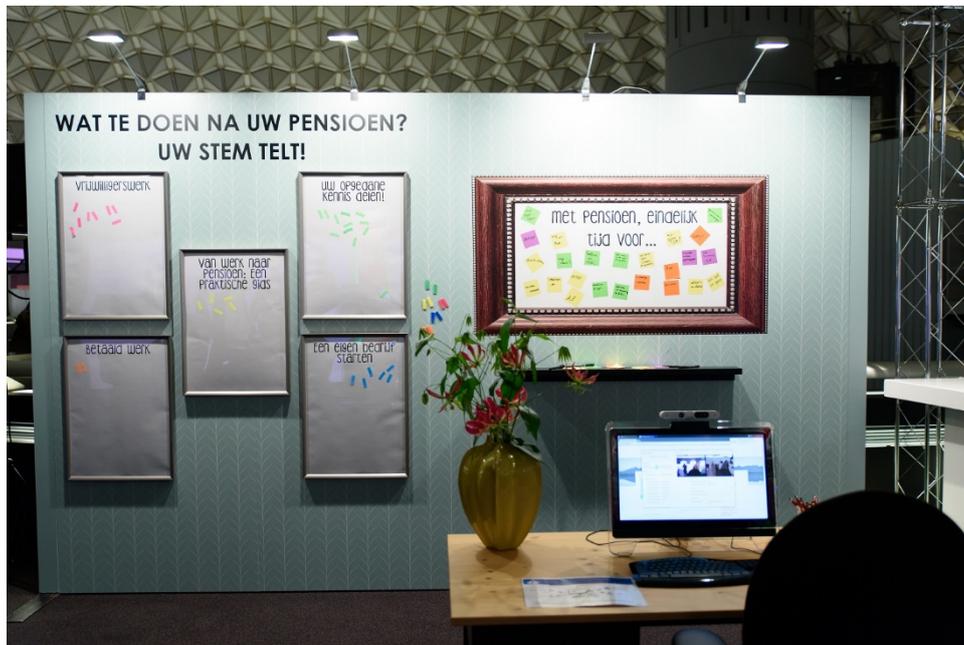
Palette at the Home Automation & Smart Living event

The Dutch funding agency for the AAL programme ZonMw has published a AAL brochure in January 2017. In that brochure 12 AAL projects are presented as good practices, among those PaletteV2. Below some pages of the brochure are shown, including the reference to the Palette project. The title of the brochure is: 'The breeding pond of AAL, jointly develop and market ICT-solutions for older persons.'
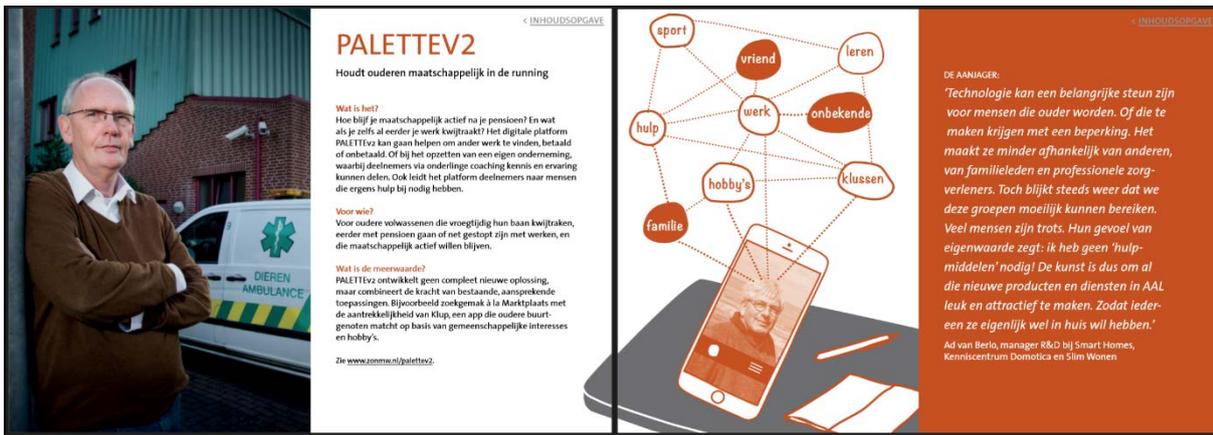
AAL Brochure ZonMw

[UOB] UB's contribution consists of contacting an assurance company (GENERALI assurance) and different magazines regarding the dissemination of the project's aim.

We searched for these interested parties, contacted them and we wrote articles to be published in magazines, for the ones who replied. Here's a list of publications who wrote about Palette after we contacted them:

- Psychologies magazine: http://www.psychologies.ro/noutati/platforma-palette-v2-viata-activa-pentru-seniori-2161104
- Femeia.ro magazine: https://www.femeia.ro/timp-liber/lifestyle/o-alta-metoda-de-a-imbunatati-calitatea-vietii

We also sent an article to ComunicateDeAfaceri.ro, another business magazine, and it should be published soon.

Other activities related to dissemination
- Translating the recruitment flyer
- Translating and disseminating the poster for the focus group sessions
- Writing dissemination plans
- Reporting dissemination activities

[KEMP] The Palette project is included on the website of KempenLIFE. KempenLIFE assisted Smart Homes in the annual 2-day Home Automation & Smart Living Event of Smart Homes. At the 2016 event, held on 16 and 17 November, the Palette platform was presented in the booth of Smart Homes via a wall where visitors could indicate their preference for the different thematic areas of Palette via voting and they could indicate their desires for the time after their retirement.

The Dutch funding agency for the AAL programme ZonMw has published a AAL brochure in January 2017. In that brochure 12 AAL projects are presented as good practices, among those PaletteV2. Below some pages of the brochure are shown, including the reference to the Palette project. The title of the brochure is: 'The breeding pond of AAL, jointly develop and market ICT-solutions for older persons.'

DE KWEEKVIJVER VAN AAL

Samen ICT-oplossingen voor ouderen ontwikkelen en vermarkten

AAL
PROGRAMME
ACTIVE AND ASSISTED LIVING

ZonMw

Opdracht aan alle publieke en private partijen om te investeren in ICT-oplossingen die de zelfredzaamheid van ouderen bevorderen

Maatschappelijke doelen
- Langer zelfstandig wonen
- Meer kwaliteit van leven
- Besparing kosten langdurige zorg
- Economische boost voor bedrijven in de EU

Looptijd
2008-2020
Doorlooptijd projecten: tot in 2024
Time-to-market: tot 2027 en verder

Gedachtegoed
Door internationale samenwerking lukt het beter om goede ICT-oplossingen voor ouderen, nu en in de toekomst, beschikbaar te krijgen.

Landen die samenwerken

Canada

België
Canada
Cyprus
Denemarken
Duitsland
Finland
Frankrijk
Griekenland
Hongarije
Ierland
Israël
Italië
Luxemburg
Nederland
Noorwegen
Oostenrijk
Polen
Portugal
Roemenië
Slovenië
Spanje
Verenigd Koninkrijk
Zweden
Zwitserland

13 ZONMW – DE KWEEKVIJVER VAN AAL

Sinds 2008 is Nederland aangehaakt bij 71 Europese AAL-projecten. Op deze pagina's staan een paar aansprekende voorbeelden. Met daarbij steeds een quote van binnenuit, over de meerwaarde van slimme technologie voor ouderen.

4
VERHALEN ACHTER DE TECHNIEK

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12 AAL-oplossingen

ANNE
CO-LIVING
IRONHAND
HALLOZORG
SENSARA
HOMEDOTOLD
ALFA
SOCIALCARE
VICTORYAHOME
COME
PALETTEV2
ACTIVEADVICE

PALETTEV2

Houdt ouderen maatschappelijk in de running

Wat is het?
Hoe blijf je maatschappelijk actief na je pensioen? En wat als je zelfs al eerder je werk kwijtraakt? Het digitale platform PALETTEv2 kan gaan helpen om ander werk te vinden, betaald of onbetaald. Of bij het opzetten van een eigen onderneming, waarbij deelnemers via onderlinge coaching kennis en ervaring kunnen delen. Ook leidt het platform deelnemers naar mensen die ergens hulp bij nodig hebben.

Voor wie?
Voor oudere volwassenen die vroegtijdig hun baan kwijtraken, eerder met pensioen gaan of net gestopt zijn met werken, en die maatschappelijk actief willen blijven.

Wat is de meerwaarde?
PALETTEv2 ontwikkelt geen compleet nieuwe oplossing, maar combineert de kracht van bestaande, aansprekende toepassingen. Bijvoorbeeld zoekgemak à la Marktplaats met de aantrekkelijkheid van Klup, een app die oudere buurtgenoten matcht op basis van gemeenschappelijke interesses en hobby's.

Zie www.zonmw.nl/palettev2.
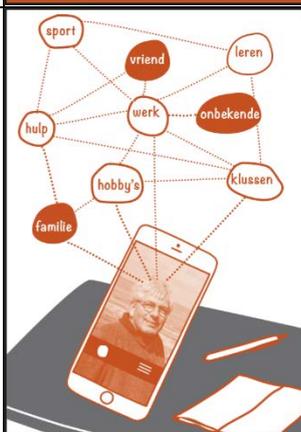
DE AANJAGER:

'Technologie kan een belangrijke steun zijn voor mensen die ouder worden. Of die te maken krijgen met een beperking. Het maakt ze minder afhankelijk van anderen, van familieleden en professionele zorgverleners. Toch blijkt steeds weer dat we deze groepen moeilijk kunnen bereiken. Veel mensen zijn trots. Hun gevoel van eigenwaarde zegt: ik heb geen 'hulpmiddelen' nodig! De kunst is dus om al die nieuwe producten en diensten in AAL leuk en attractief te maken. Zodat iedereen ze eigenlijk wel in huis wil hebben.'

Ad van Berlo, manager R&D bij Smart Homes, Kenniscentrum Domotica en Slim Wonen

AAL Brochure ZonMw

WP3 End user requirements

Summary

[VILANS] **Vilans** supported in the procedure for the focus groups and end-user requirements in WP3. Vilans supported during the first focus group that was held in Eindhoven, The Netherlands, in august 2016. Together with Smart Homes and KempenLife, Vilans is setting up three additional focus groups to gather end-user needs from October to December 2016. WP3 is aligned with WP5, from requirement analyses to co-design sessions to Alpha and Beta prototype evaluations.

[SMH] In the previous period Smart Homes took over the role as WP3 leader. An adapted planning for the workpackage was made to adapt to delays in this workpackages due to the withdrawal of SSW and to align with the plans of workpackage 5.

[SIVECO] In this workpackage 3, we performed the following activities:
- Usability aspects - analysis of the potential technology
- Analysis of functional specifications regarding the platform
- Analysis of the know-how of the potential technology
- On-line meeting regarding user analysis and requirements
- Discussions with the technical teams regarding the functional specifications
- Translating the materials for Focus Group interview
- Establishing with the project team the technical specifications of the platform
- Analyze the of the platforms propose by the consortium members.
- Face to face meeting - focus group session; session on technology
- "Platform presentation - face to face meeting, Bucharest"
- Analysis of other platforms to identify sections needed to be described on the deliverable analysis of the technical specifications
- Discussions with the team after then analysis of other platforms
- Analysis of functional specifications: Platform overview
- Benefits and platform presentation
- Requirements and nonfunctional requirements
- Development of the deliverable analysis of functional specifications
- Formatting/correcting the documentation for the Focus Group Interview
- "Platform presentation - face to face meeting, Bucharest"
- Target group analysis models specifications - types of personas
- Validate of the deliverable analysis of functional specifications
- Translation of the focus group informed consent
- Translation of the focus group description and manual
- Translation of the workshop focus group instructions for user
- Identifying experts who will be involved on the development platform.
- Allocation of project team
- Discussions with the project team on the objectives and technical results of the project
- Co-creation session
- Discussions regarding the IPR for the technical solution proposed for the project

[KEMP] In the previous period Smart Homes took over the role as WP3 leader. KempenLIFE assisted Smart Homes in several activities.

Task3.1: End user requirement analysis

During this task, the partners will identify the user needs and requirements that will drive the functional definition as well as the design and posterior development of PALETTEV2 system. It is very important to capture and understand their perspective because this user-centrered design approach is implemented through the whole project.

[SMH] In the previous period desk research has resulted in an overview of existing platforms and initial focus groups where conducted to learn more about the user needs. Smart Homes created user profiles based on first focus group results and the literature. Preliminary results and the preliminary user profiles were then discussed and presented at the consortium meeting in Bucharest on 12 and 13 September 2016. During that meeting the consortium agreed on a further specified focus of the project. This input was used to plan the next sessions.

Focus group session
[SMH] After the Bucharest meeting Smart Homes developed a plan for the second phase of focus group sessions. To ensure that all user partners use the same approach Smart Homes wrote a manual and held virtual meetings where partners responsible for carrying out some focus groups could discuss the approach and ask questions about it. In order to get valuable and useful data for the analysis from the sessions in all countries and to be able to get an idea of differences and similarities between countries a reporting template was used to collect the data from all the sessions held.

As a result of the initial focus groups the following conclusions were drawn:
- Based on initial sessions focus is created and for the next round of sessions the recruitment will be much more targeted.
- Three initial personas including a description of how they could use the Palette platform where developed that will be complemented with results from the previous consortium meeting and phase 2.
- Use methodology of user profiling to create structure in the diversity of potential users and to link to functionalities of the platform (example see picture below).
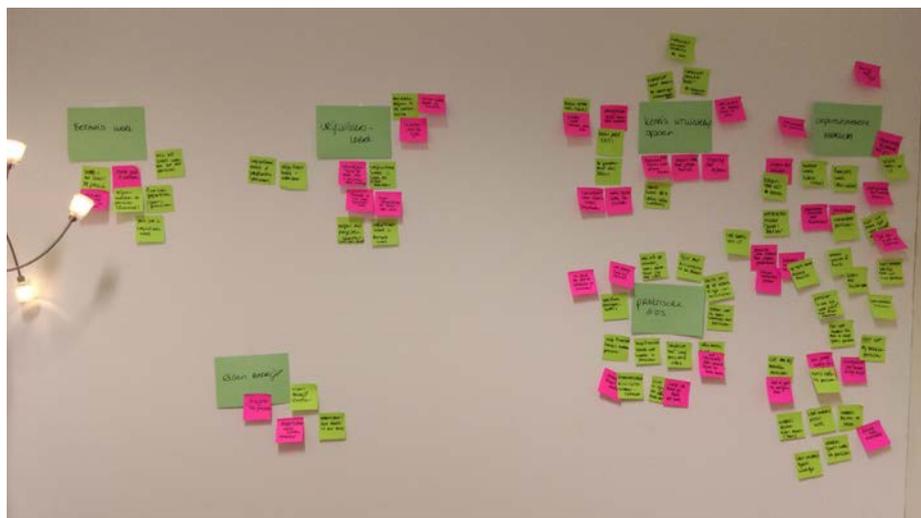
Goal focus group phase 2
- Identify needs of the target population and prioritise these needs
- Map the current situation (how is it done at the moment)
- Problems in current situation, find room for improvements
- Identify possible differences between countries
- **Sessions**: 2-3 in total in each country (Netherlands, Switzerland, Poland, and Romania) with 5-8 people per session.
- Complementary interviews

Participants: No specific age is defined, Palette is targeted at older adults around the retirement age. This includes:

- 50+ who lost their jobs before retirements
- People going into early retirement
- People who recently retired (+/- <70 years old). This age limit is set as palette is focusing on older adult, specifically the young-olds who might have different needs than the middle-old and old-old.

Sessions held:
- Netherlands:
    - 1 in Alkmaar with 4 participants
    - 1 in Eindhoven with 4 participants
    - 4 interviews
- Switzerland
    - 2 sessions; one with 3 participants and one with 4 participants
    - 1 stakeholder interview
- Romania
    - 3 sessions; two with 5 participants, and one with 4 participants
- **Total: 34 participants**

Impression of the sessions:

Smart Homes analysed the reports provided on all the sessions held and presented the results at the consortium meeting in January 2017. Based on the results a list was made with features to be included in the personas. Some examples:

- People can also share knowledge about their hobby/their passion. Not only sharing related to working skills
- More emotional elements; feeling of being useful, isolation, idea of being free when retired, feeling of emptiness, maintain a connection with young people.
- Start on paper and follow-up on the internet
- Element of surprise in offer of the platform, to be alerted to something, new things that I didn't know that exists
- More 'getting' info from the platform then 'putting' info on the platform

A concept that emerged during the analysis was "meaningful activities". The Preference of meaningful activities is depending on Personal interests, Characteristics and External factors.

Work
- Passionate about a certain job or career path.
- Financial situation might be a motivation to continue working.
- Forced retirement result in interest in finding work
- A High work engagement and a willingness to share knowledge
- Working without the stress and obligations
- Caregiving when family or friends need help.

Hobbies
- The Retirees considered retirement as having the time to only do the things they like, such as travelling, reading, cooking and making furniture.
- Resuming with hobbies
- Exploring new hobbies

Knowledge transfer
- Continue learning beyond retirement
- Sharing (professional) knowledge
- Contact with younger people

Isolation
- Isolation after retirement.
- Working life with routine and colleagues has always been the focus.
- Loss of partner.
- Might be a relation with personal characteristics

To stimulate the discussion also a list of potential design choices was made and presented to the consortium, some examples:
- Initial ideas to be further elaborated during co-design
- Desired modularity; in terms of topics as well as digital skills. Some topics not familiar, e.g voluntary work.
- Personalization of the platform; how to adapt? Indicate beforehand, intelligent platform that adapts based on use, push messages (desired or not)
- Level of interaction on the platform: how can the users upload and how do you motivate users to do so?
- Scale; is there a preference for local information or rather national and per main theme. Is there a desire to create a private community? How to set up a community?

[HUG] HUG participates in the second phase of focus group sessions by following the manual created by Smart Homes. Two focus groups were held in Switzerland, one on the 8th December 2016 with 3 participants and one on the 12th December 2016 with 4 participants. HUG reports their results from the two sessions using the template made by Smart Homes. HUG also led an interview with a stakeholder: the HUG human resources director in order to have an external opinion.

Our detailed tasks were as follows:
- On-line meeting concerning the focus groups planification
- Recruit the participants for the focus groups in Geneva
- Translate the materials for the focus groups in french (informed consent, manual, questionnaire)

- Lead the two focus groups with the end-users
- Record the audio and take some pictures
- Translate and report the results for the other partners by creating Personas according the needs and caracteristics of the end-users
- Face to face meeting in Bucharest : presentation of the results from focus groups held in Switzerland

The Focus Group consisted of three parts: 1) Introduction (questionnaire, informed consent and explanations), 2) Free discussion (concerning the themes work, learning, health, use of technology), 3) Workshop with an User journey and the M3 technique.

[UOB] To collect the requirements and needs of the target group, we conducted qualitative research on the interests and needs of the end-user target group, following the instructions in the Focus group manual and applying the focus group guide. The purpose of these research activities was to create end-user profiles for the development of these platforms in a way that best suits their needs.
The research activities involved the following sub-activities:
- Selection of relevant actors for inclusion in research activities
- Organizing three focus group meetings with end-users
- Making lists of attendance and consent forms
- Moderating the three focus group meetings
- Record audio and video of focus group sessions and take photos within them
- Transcription, translation and analysis of the three focus group meetings
- Reporting the results following the proposed templates

The research activities involved the following sub-activities:
- Selection of relevant actors for inclusion in research activities
Focus group participants were 10 (5 in each focus group), 7 female and 3 men aged 56 to 74.
The selection involved contacting people interested in the project, having the characteristics of the target audience of the project, presenting the project and establishing a meeting with them.
- Organizing three focus group meetings with end-users
Focus groups were held at the University of Bucharest on Thursday, November 3, November 24, 2016, starting at 17:30 and on December 15, 2016, at 17:30.
- Making lists of attendance and consent forms
- Moderating the two focus group meetings
The moderation of the focus group meetings was done as indicated in the focus group manual, with attention to the involvement of all participants and the pursuit of as much information as possible about their lifestyle and needs. The focus group guide required the addition of spontaneous questions related to the experience and context of the participants' lives. After formulating the responses of each participant, it was rephrased by the moderators to ensure the clarity of the message and explored possible ways in which the platform developed within the project could support their interests.
- Record audio and video of focus group sessions and take photos within them
With the approval of participants in focus group meetings, moderators filmed and recorded conversations to preserve the accuracy of the collected data.
- Transcription, translation and analysis of the two focus group meetings
- Making end-user profiles according to their features and needs
Following transcription, the analysis was made by providing a more accurate description of the speaker, under the aspects followed according to the interview guide. The following topics and information were therefore considered:
- General description of the participants (age, profession, education, housing)

- Personal description of retired life
- Past or present hopes of retirement life
- Describing the challenges of everyday life
- Things they would like to do, but they did not have the opportunity
- Involving them as volunteers
- Any other retirement-related additions not mentioned
- Elections, preferences for platform functionalities and functionalities they do not consider useful - Testing the concept

These broad descriptions of the focus group participants were made with the aim of shaping end-user profiles. These have been implemented during the course of the research and they have been better developed after the co-creation sessions in March, 2017.

[KEMP] After the Bucharest meeting KempenLIFE assisted Smart Homes in developing a plan for the second phase of focus group sessions.

Sessions held:
- Netherlands:
  - 1 in Alkmaar with 4 participants
  - 1 in Eindhoven with 4 participants
  - 4 interviews

Impression of the sessions:

KempenLIFE assisted Smart Homes in analysing the reports provided on all the sessions held and presented the results at the consortium meeting in January 2017. Based on the results a list was made with features to be included in the personas.

Task 3.2 Usability aspects

The aim of this task is to develop intuitive and user-friendly usability concepts considering usage behaviour and user scenarios. These concepts will then be evaluated and refined in an interactive process.

[SMH] Based on the results of the second round of focus groups and as input for the co-creation sessions some design where made to stimulate discussions, see sketches below:
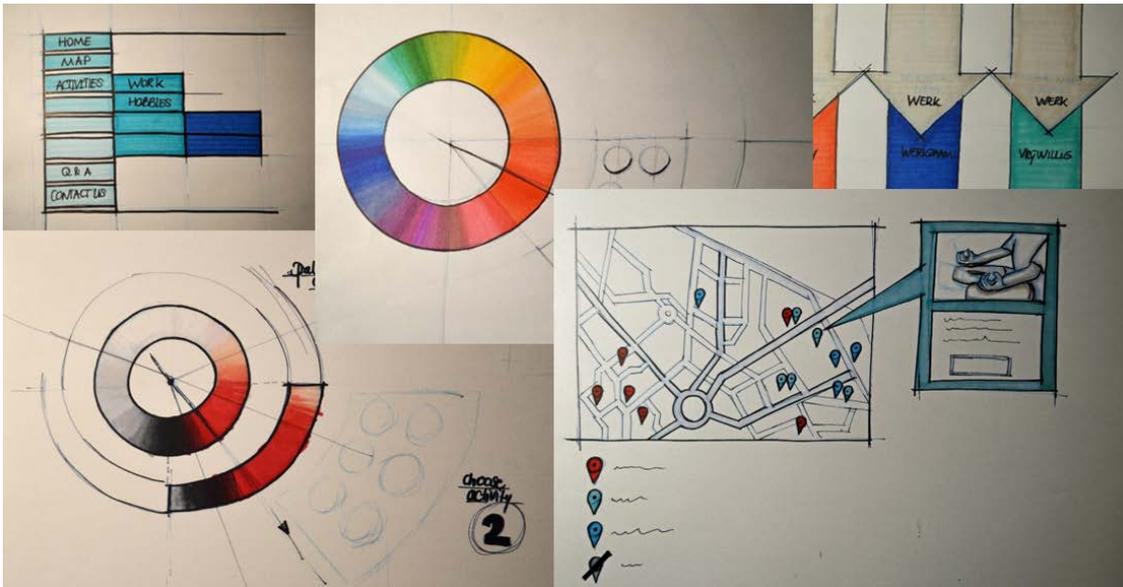
This idea was presented at the consortium meeting in Utrecht. During that meeting in an interactive workshop also other ideas where elaborated. Based on these discussion Vilans developed initial design to be used in co-creation sessions. Smart Homes was present at the sessions that were held in the Netherlands jointly with Vilans and the session were held at the demonstration facility of Smart Homes. In total 4 sessions in the Netherlands (1:n=5, 2:n=4, 3:n=6, 4:n=4). Below some pictures of these session.

The MoSCoW method was used to rate the level of importance of a singular requirement and to further define the Palette platform and some usability aspects.

Palette **MUST**:
- Act as a matching platform for people, services and meaningful activities
- Facilitate services (divers e.g. carpooling, changing a lightbulb, trim the hedge, pet care, and help with PC)
- Facilitate meaningful activities (divers e.g. volunteering, interest)
- Stimulate social contact rather than substitute social contact
- Help with finding a new routine
- Offer basic practical information online
- be multilingual so that the platform works in PaletteV2 users' national language
- Able to see functionalities of palette without making a profile
- Focus, without limiting, on a local operating scale
- Offer trust to the user
- Have a reviewing system for activities and services being facilitated
- Respect the privacy of personal information

Palette **SHOULD**:
- Support the digital illiterate while not belittle the digital literate

- Offer reliable information
- Offer possibilities for learning
- Give recommendations for meaningful activities
- Connect people with a buddy kind of service
- Offer a discussion / forum to talk about content related to palette
- Automatically capture content (e.g. activities) with web crawler
- Stimulate to share knowledge

Palette **COULD**:
- Verify the person placing content on the platform
- Offer a Q&A section
- Have a search engine to make it easier to find related content

Palette **WOULD**:
- Show information of the day
- Have a history overview
- Membership system
- Let user get to know new interests by the people they know
- Let users meet new people by interest they already have

[UOB] UOB's contribution consists in testing the concept by creating end-user profiles. To contribute to this activity, we have been involved in the following sub-activities:
- Theoretical research to ensure a correct adaptation of the research instruments and the methodology proposed by the other partners to the Romanian social context
- Involvement in the discussions that led to the implementation, translation and adaptation of the focus group manual
- Recruiting people from the target group according to the criteria specified in the manual
- Involvement in research activities respecting and pursuing the purpose of testing the functionality of the concept

Co-creation sessions
- Organizing 3 co-creation sessions with the same people who participated in the focus group meetings
- Translating the documents needed for the sessions
- Collecting information – applying the questionnaires, managing the discussions
- Translating and reporting the results
- Creating end user profiles based on their personal information and requirements

UB's contribution consisted in testing the concept by creating end-user profiles. To contribute to this activity, we have been involved in the following sub-activities:
- Theoretical research to ensure a correct adaptation of the research instruments and the methodology proposed by the other partners to the Romanian social context

The target group, consisting of people aged between 65 and 70+, represents a majority of the Romanian population. From a sociological point of view, people past their first youth are rather uninterested in the online environment. There is, however, an interested party in "social media" - interested for reasons based on common needs. The fact that most seniors, newly retired, face daily social problems (many of them wondering what communication possibilities and social practices will have at hand in this new phase) led to the elaboration of a plan to recruit several representatives with the aim to highlight the difficulties and the expectations that this majority has in terms of the online environment.

The co-creation sessions

3 co-creation sessions have been organized on March 8, March 21 and March 22. They lasted for about 2 hours each.

The co-creation sessions were designed in order to test the ideas that were obtained in the focus group sessions from 2016. Another purpose of the co-creation sessions was to create the end user profiles. In order to do this, we translated and applied the questionnaires.

The discussions were built around the following themes:
- Interests and themes that should be part of the platform: practical information, work, hobbies etc.
- Platform design / layout – how should the platform look like and why?
- The purpose of having a profile on this platform – how should the platform look like in order to best suit the end users' interests
- Trust issues with online profiles and the platform

[HUG] HUG contributes to the usability aspects by organizing three co-creation sessions in Geneva, following the manual created by Vilans. Three co-creation sessions were held in Switzerland, one on the 16th March 2017 with 6 participants, one on the 20th March 2017 with 4 participants, and one on the 21th March 2017 with 3 participants. HUG reports their results from the three sessions using the template.

Our detailed tasks were as follows:
- On-line meeting concerning the co-creation sessions planification
- Recruite the participants for the co-creation sessions in Geneva
- Translate the materials for co-creation sessions in french (informed consent, manual, questionnaire)
- Lead the three co-creation sessions with the end-users
- Record the audio and take some pictures
- Translate and report the results for the other partners using the template

The co-creation sessions consisted of three main themes: 1) What themes must be part of the platform? How are they visible on the home page? What should the platform offer regarding each different theme? 2) How does the platform provide content to the user and make connection with other users ? What role could a personal profile have here? 3) How does the platform earn the end-user's confidence and facilitate making to the real world?

[KEMP] Based on the results of the second round of focus groups and as input for the co-creation sessions some design where made to stimulate discussions, see sketches below:
This idea was presented at the consortium meeting in Utrecht. During that meeting in an interactive workshop also other ideas where elaborated. Based on these discussion Vilans developed initial design to be

used in co-creation sessions. Smart Homes and KempenLIFE were present at the sessions that were held in the Netherlands jointly with Vilans and the sessions were held at the demonstration facility of Smart Homes. In total 4 sessions in the Netherlands (1:n=5, 2:n=4, 3:n=6, 4:n=4).

Task 3.3 IPR, Ethical and Privacy Issues

The consortium will establish a framework for drafting an IPR agreement as part of the Consortium Agreement. It will be negotiated in line with the exploitation strategy developed and based on the specific interests and plans for exploitation of each individual partner. The task also comprises the development of an ethical issue management plan for the user and business requirements analysis and the user studies involvement. It ensures the safeguard of ethical and privacy rights of all involved end users.

[SMH] The development of new technology is generally accompanied with research activities that included human subject sharing their thoughts and experiences. Within the PaletteV2 project several research methods will be used to determine (WP3) and validate (WP5) the direction of the PaletteV2 project. To protect human subjects in these research activities, each activity has to take into account serval ethical aspects and human subjects' rights. At this stage of the project the main focus is on informed consent and the way to threat participants in a focus group.

Before a participant can take part in any kind of research, their consent to take part in the research activity has to be given. Participant giving their consent is needed in any type of research being performed, as it includes that participants are agreeing with the research activities being performed, but also with its possible risk and benefits. Giving consent includes several steps, namely debriefing possible participants about the study and about their rights as a participants, but also giving consent. This approach has been included in the guidelines for the focus groups and an informed consent to be used is developed by Smart Homes.

When the actual research activities are being perform, there are also regulations and suggestions on how to perform these activities in general research activities.

- **Dealing with participants:** Any participants should be given respect, this also includes their opinion. There are by no means no right or wrong answers, as any opinion is one to be valued. Participants should therefore be given enough opportunities to express their own opinion, this includes allowing a participant to finish its sentences, but also to not enforce the researchers' opinion to the participant.
- **Everybody should be able to join:** There could be several factors that might hinder participation in any research activity, however anybody that fit the inclusion criteria should be able to join. For example, a person who is not very mobile could be picked up by taxi service or by someone involved in the project.
- **Value the voluntary participation:** People are giving their spare time to participate in a research activity. Although people could find these activities enjoyable, there must be something else in exchange for their valuable time. First of all, joining a research activity must not cost the participant any money. Any cost related to traveling for the research activity must be compensated (e.g. train tickets, taxi services, kilometre allowance). Although not mandatory, it is also advised to give the participant something extra for their effort, especially when people can be approached multiple times for research activities. For example, give a gift certificate and provide something nice to eat and drink, longer sessions could even include lunch.

These aspects where taken into account when organizing the sessions and part of the guidelines for the organisations that carried out the focus groups. In the Netherlands for example an employee of Smart Homes picked up participants for the sessions at their home, arranged a gift for the participants and in some occasions provided lunch.

WP4 PALETTEV2 System and services development

[SMH] No concrete task in this period. A technical expert from Smart Homes did join the meeting in Maribor to assist in making the transfer from user requirements to a technical design. This activity will intensify in the upcoming period.

[SIVECO] In this WP4 we performed the following activities:
- Analyzing the technical solution; consortium skype
- Consortium discussions regarding the technical solution
- Developing effort Open source - Advance features; Integration and unit testing
- Developing effort AeL - Advance features; Integration and unit testing
- Developing effort AeL - Basic features
- Developing effort AeL - Main features
- Developing effort Framework solution - Basic, Main and Advance features
- Developing effort Framework solution - extracting on-line information's regarding the proposed product
- Developing effort Open source - Basic features
- Developing effort Open source - Main features
- Preparation of the workshop for the face to face meeting
- Validation of the technical solution for the project
- WP4 Face-to-face meeting Utrecht
- Session on technology
- Update the user profile Palette, after validating with the technical partner
- User profile Palette

D4.1 Technical architecture report –
- Basic features:
    - Registration
    - Login & Logout
    - Forgot password
    - Multi-language
    - Basic features: Responsive design
    - Database integration
- Main features:
    - Profile (ability to operate w/o profile as well)
    - Work: Company, Years, Position
    - Skills: School, Years, Education
    - Interests: Categories (selected from a pre-defined list)

- Internal discussions regarding the technical solution
- Analyzing the possibilities to offer the source code for the project platform. Identifying solutions
- Consortium online meeting and technical meeting
- Internal meeting with the team discussing the activities for the next period
- Internal meeting with the team discussing the activities for the next period

WP5 Testing, validation and evaluation

As agreed the work in Wp5 starts earlier as planned to ensure alignment with WP3 and to be on time to provide input for the technical development.

T5.1 Test and evaluation specification

[VILANS] An inventory is being made of competing and similar platforms as PaletteV2 to re-use successful modules and services developed in other (AAL) projects. Vilans specified the task descriptions for WP5 – including the iterative user-centered design approach - in detail and rewrote the tasks to align them with WP3. WP3 and WP5 will work in parallel to ensure end-user involvement throughout the project design cycles from Alpha to Beta evaluation studies. In the PaletteV2 workplan it was written: T5.1 Test and evaluation specification (M23-M25); T5.2 End user final feedback integration (M25-M28); T5.3 Testing and validation of PALETTEV2 system (M26-M30); T5.4 System and Service evaluation – Trials (M26-M30). These tasks will still be performed within the time period as a Beta – summative – evaluation. However, Alpha – formative – evaluations are also necessary. Therefore, Alpha tests are planned in Q4 of 2017, after the co-design sessions held in Q1 of 2017 and the technical developments based on the co-design (paper prototyping) sessions. The measurements in the Alpha to Beta studies will include: user acceptance, perceived usability, accessibility of the UI, system data and error logs, Technology Acceptance, Self-efficacy, Social Connectedness, learning, desirability and willingness to pay.

[SMH] Assisted Vilans in defining the first step in the co-creation process. On 10 January a meeting was held to discuss the co-creation test session to be held in the Netherlands. After this test sessions and the consortium meeting in Utrecht a follow-up meeting took place on 14 February to discuss the material needed for the next round of co-creation sessions to be held in March 2017.

[KEMP] Together with Smart Homes assisting Vilans in defining the first step in the co-creation process. On 10 January a meeting was held to discuss the co-creation test session to be held in the Netherlands. After this test sessions and the consortium meeting in Utrecht a follow-up meeting took place on 14 February to discuss the material needed for the next round of co-creation sessions to be held in March 2017.

Conclusions

[UOB]

The objectives have been achieved through UB's contribution in terms of

- research activities for the purpose of end-user profiles, which correspond to the deliverable 3.1 End user requirements report;
- testing the functionality of the concept and its observance by using the proposed methodology, during focus groups and co-creation sessions, including providing feedback on the creation of this methodology, which corresponds to the deliverable. 3.2 Usability report;
- contribute to creating a user community that is needed to disseminate the results and create an advertising poster , part of the deliverable 2.3;
- dissemination of the project's aim and results towards interested parties – assurance companies and magazines – by contacting them and writing the articles.
- compliance with the ethical paradigm of the project and creation and use of the consent form for the focus groups, and translation of the consent form for the co-creationsessions part of the deliverable 3.4.