AMBIENT ASSISTED LIVING, AAL

JOINT PROGRAMME

ICT-BASED SOLUTIONS FOR SUPPORTING OCCUPATION IN LIFE OF OLDER ADULTS

D2.4 Pilot Study Evaluation Report

Project acronym:	**ProMe**
Project full title:	**ProMe – Professional Intergenerational Cooperation and Mentoring**
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TERMINOLOGY & ABBREVIATIONS

To assure coherent terminology and abbreviations across all documents inside the project, the specific terminology and abbreviations for this deliverable should be written here.

E.g. ..... Example given

MA ..... Mutual Agreement

SC ..... Social Capital

1 EXECUTIVE SUMMARY

This deliverable describes the results of the ProMe pilot study that took part from March 2017 until the beginning of June 2017 in Austria, Romania and the Netherlands. In this document, we point out the ***theoretical background*** to the study (see Section 2), where we focus on the research goals and questions. Moreover, the ***(initially) planned study design*** (see Section 3) is described. This section includes the study procedure, recruitment, and data assessment for the different setups at each partner. In order to ensure a high-quality pilot study, a ***pre-test and an internal test at PLUS*** were carried out and we report on both, structure and results, from these tests in section 4. Finally, the ***overall results of the pilot study*** are presented and discussed in section 5. The document closes with an overall summary of the pilot study, provided in section **Fehler! Verweisquelle konnte nicht gefunden werden.**.

1.1 Link with the objectives of the project

The main goal of the field trial was to evaluate the platform with at least 100 potential end users (older and younger adults), who could use the platform over a period of 8-12 weeks in a "natural" environment. Hence, users had the opportunity to become active as a mentor or a mentee, according to their needs, wishes, and preferences from their home computer as well as mobile devices.

2 INTRODUCTION

ProMe aims at facilitating experience and knowledge exchange and development across generations and to build up meaningful, supporting relationships, i.e., relationships from which older adults and younger generations gain benefits. During the course of the project, a variety of different tools were developed and evaluated by potential end users (older and younger adults) as well as usability experts. As a final step in the project, the platform was evaluated with potential end-users from end of March 2017 until beginning of June 2017. Based on the cases that have been developed for the three end user organizations in the project (EURAG, AGIR, NFE) mentor and mentees were recruited in Austria, Romania, and the Netherlands. It was initially intended to make the platform available for potential users in UK, the Netherlands and Belgium. However, since the platform was not running stable and a lot of bugs and errors occurred already in the beginning of the trial (see also section 5.10) it was decided to test the platform only with a limited amount of potential end users.

2.1 Theoretical Background

The main focus in the project was to ***support mutual beneficial relationships and allow cross-generational collaboration through mentoring***. For the development of the platform we relied on the theoretical concept of social capital (SC), which is based on the idea that social relationships have got value (provide benefits). ProMe aims at providing benefits by allowing users to gain access to collective knowledge (intellectual capital), which is developing through the *exchange* of knowledge. Nahapiet and Ghoshal (1998) define it as *"the knowledge and knowing capability of a social collectivity, such as an organization, intellectual community, or professional practice"* (p. 245). This, in turn, allows individuals to act in new ways. Consequently, intellectual capital is created through social interaction. Hence, a central goal is to support and facilitate cooperative processes via the platform. Relationships that are characterized by trust and reciprocity hold potential for social capital, facilitate the exchange of knowledge or experience and allow the creation of new knowledge, i.e., intellectual capital. Nahapiet and Ghoshal (1998) distinguish between three dimensions of social capital, i.e., the structural, the relational, and the cognitive dimension (see Figure 1, adapted from Nahapiet & Ghoshal 1998).

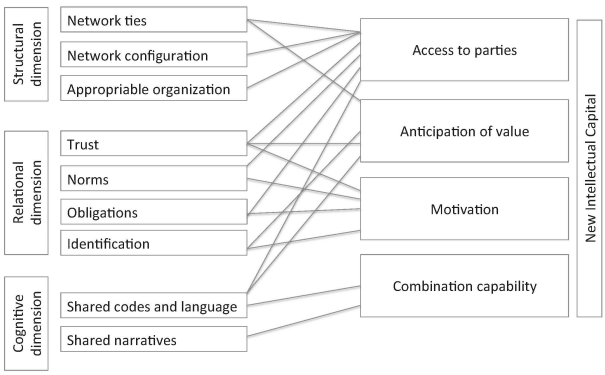

Figure 1: Social Capital in the Creation of Intellectual Capital

According to Nahapiet and Ghoshal (1998), the ***structural dimension*** of SC refers to the properties of a social system, i.e., standards of connections like density or stability of a social network. It describes impersonal aspects of social connections, i.e., the way we connect to others and to whom we connect. The authors also refer to patterns of linkages such as a hierarchy. For the purpose of our research we extended this definition and considered the channels (e.g., devices, tools) as part of the structural dimension. The way users get and stay in contact with each other influence density, connectivity, and hierarchy. Hence, we consider the infrastructure that is used to get in contact and to develop overall patterns of connections important for the development of social capital. The ***relational dimension*** describes the character of social relationships that emerges through constantly recurring interactions and results in *"relational embeddedness",* characterized by *"interpersonal trust and trustworthiness, overlapping identities, and feelings of closeness or interpersonal solidarity"* (Moran 2005, p. 1132). Thus, besides the infrastructure, (opportunities for cooperation via, e.g., video-chat), it is important how a system can support or facilitate trust and reciprocity. Of course, this depends on the given infrastructure. A system that provides a variety of non-verbal cues that are important in human communication (Rettie 2003) might evoke more closeness and a feeling of presence than a system that lacks non-verbal cues and only allows, for example, communication via text messages (Dalzel-Job et al. 2011). However, it encompasses also norms of communication, expectations or obligations. Norms, for example, define patterns of behavior and regulate social actions through sanctions. Obligations allow collaboration partners to anticipate the behavior of others, which in turn has a positive effect on the motivation of the collaboration partners to engage with each other (Nahapiet and Ghoshal 1998). Finally, the ***cognitive dimension*** of SC concerns resources that allow a shared understanding among two or more parties. Resources include, for example, a shared language (Nahapiet and Ghoshal 1998). Considering, that the platform allows cooperation across geographical boundaries, not only the language but also cultural differences might play a central role to allow a shared understanding. All three dimensions were considered for evaluation purposes in the field, hence we aimed at investigating if the infrastructure (structural dimension) we provided via the platform allowed users to successful connect and collaborate with each other, to what extend the tools for communication support users to overcome virtual distance, the development of norms of cooperation, and facilitation of identification (relational dimension), and to what extent the platform supported users to overcome cultural differences (cognitive dimension).

2.2 Research Goals and Questions

The main goal of the pilot was to ***evaluate the ProMe platform with regard to its potential to support mentor and mentee to develop a successful mentoring relationship and collaboration.*** Hence, we aimed at evaluating to what extent the platform allowed users to ***create SC in terms of intellectual capital*** through social interaction. We relied on the theoretical model of Nahapiet and Ghoshal (1998) and considered the structural, relational and cognitive dimension of SC within our evaluation. In the following, we briefly describe the central goals and research questions with regard to these three dimensions. How these research questions are going to be addressed within the field trial is described in the respective study setups.

RQ1 How does the network structure allow users to successfully work together? RQ1 focuses on the impersonal relations between users on the platform (structural dimension). We aimed at investigating to what extent the structural dimension supported participants to successfully work together. The following aspects were considered: ***Network ties*** - access to resources (e.g., Did users find a match?), timing (e.g., How long did it take until users found a mentor), reputation (e.g., if participants found a match, if they had the feeling that the person would be appropriate to provide support) ***Network configuration*** – density (How many mentors/mentees have been active on the platform during the duration of the trial? What was the network's configuration with regard to the expertise provided)?

RQ2 How do users overcome the virtual distance when communicating via the platform? This research question aimed at assessing how users ***established first contact*** and how they ***regularly worked*** **together**. Moreover, we explored users' subjective experience of the "quality" of their collaborative relationship (satisfaction), investigated their subjective experience of closeness/connectedness when communicating with each other, and their satisfaction with the frequency of meetings.

RQ3 To what extent does the platform facilitate the development and compliance of norms of cooperation? With RQ3 we investigated to what extent users hold on to their obligations defined in the Mutual Agreement tool[1], i.e., if they could reach the defined goals. Moreover, we were interested to what extent the quality of the relationship (subjective experience) influences the compliance of norms of cooperation.

RQ4 How does the platform allow users to define the framing conditions of their collaborative relationship? We explored how users organized the first phase within their relationship, i.e., how they negotiated expectations and obligations and to what extent the MA supported them in terms of this activity (e.g., to reflect upon and define the framing conditions of their relationship), which ***communication channels*** mentor and mentee used to get in contact in the early beginning of their relationship. Moreover, we aimed at exploring if users regularly updated their MA during the course of the relationship.

RQ5 How does the platform support users to collaboratively work together? We focused on understanding how users organize the collaboration by means of the tools provided on the platform (progress tool, calendar, notifications) Moreover, we were interested to explore which other tools are considered useful and to what extent users were ***satisfied/dissatisfied*** with the "my progress" tool.

RQ6: To what extent does the cultural background influence the negotiation and collaboration process? By means of RQ6 we aimed at understanding if users got in contact with mentors/mentees in other countries and if the language or other cultural differences influence the collaboration between mentor and mentee. Moreover, we investigated if participants reached common ground (e.g., developed a kind of shared mind-set, which can be also considered as important cognitive dimension).

[1] The mutual agreement aims at encouraging participants to reflect upon their expectations and to discuss and define the goals they aim to achieve (for a more detailed description of all different tools that are provided on the platform see also D5.3)

3 STUDY DESIGN

The field trail aims at investigating the value of the platform to ***establish mutually beneficial intergenerational relationships that allow the creation of intellectual capital (social capital).*** With regard to the study design it was initially planned to have, on the one hand, selected[2] mentor/mentee pairs (NFE), **(→ see Setup 1**)[3] who work together via the platform. On the other hand, it was planned that participants are matched via the platform. Thereby, participants from the end user organization EURAG and AGIR were recruited. (→ **see Setup 2a**). Additionally, it was planned that the platform is promoted in UK and Belgium by INV and the Leuven University College (KH Leuven), in order to get access to a bigger group of potential end users. (→ **see Setup 2b**). Setup 2b slightly differed with regard to the data assessment. Since it was planned to address a huge group of participants, feedback should be mainly gained through online questionnaires at the end of the trial. As already mentioned, a lot of technical problems occurred, which could not be foreseen and that did not allow us to implement the different study setups as planned. In the following, we briefly describe the setups and modifications that were done due to changing conditions.

3.1 Setup 1 (NFE)

Mentees were recruited in the setting of Avans, an institution for higher education. In this way, it was possible to investigate, whether this school may be a future client and how the program should look like in order to let all involved actors benefit from the platform. To investigate this more in depth, mentor/mentee pairs were followed both when working without and with the digital platform. The ProMe platform was tested within the setting of Avans University of applied sciences with students, studying Social Studies, aged 17-25 years, who could benefit from wise insights of seniors (e.g., to find an internship, thinking of a graduation topic, or whatever the couples together agree on). The students often see seniors as vulnerable and dependent, instead of full of knowledge and expertise. This pilot may help them to change their mind-set.

3.1.1 Procedure

About 15 mentor/mentee pairs were recruited and worked together for a period of two months. Half of these couples started the mentoring process in fall 2016 (control group[4]). They followed a mentoring process, but without the ProMe platform to support them. The other half started in May 2017 and tried out the platform

[2] Selected in this context means, that mentor and mentee are matched by the end user organization in advance, however, do not meet each other beforehand.

[3] This setup particularly applies for the end user organization NFE, who will use the platform for an already established mentoring program.

[4] Details about the control group are provided in the internal reports of NFE, since these participants are not the primary target group.

during the mentor process. Matching of the seniors and their mentees was done by the NFE, in close collaboration with Avans.

In the run-up phase to the pilots the seniors (both, in the platform and the control group) were asked to take part in a training about mentoring. In this interactive session, the mentors-to-be were prepared for their activity. They learned which issues they could expect in working with their mentee, how to deal with these issues and how to act when there are serious problems. The seniors practiced their selves as well by doing some role-playing. ***At the start of the pilot,*** mentors and mentees in the control group met in an informal 'blind-date' session and set-up goals together. Besides, they agreed on the frequency of meetings and what they expect from the project. Participants in the 'platform group' (both mentors and mentees) took part in an additional information event, in which the overall idea of the platform was presented and they were asked to set up a profile on the platform. Moreover, they received information with whom they were asked to connect during the trial, were informed about data recording, data usage, and were asked to sign an informed consent. ***During the field trial*** mentor and mentee, who were in the control group were accompanied by the NFE and the organization, which is related to the particular pilot. They could ask questions related to organization but also about the mentoring process. Both, mentors and mentees, were called biweekly with the following questions: How does the mentor relationship go in general? What were expectations and goals at the start of the project? How is the progress in working on the set goals? Did particular difficulties occur this week? Did irregular issues occur? Mentor and mentee in the platform group were accompanied by the end user organizations, who took the role of a supervisor and were the contact person if technical issues arose. The organizations related to each specific pilot were available for issues about the mentoring process. Data assessment was done via data logging and interviews at the end of the trial (for details see section 3.1.3). Initially, additional telephone interviews and an online feedback questionnaire were planned. Due to the variety of technical problems it took some time until the participants could start working, hence the telephone interviews were rather used to encourage and motivate participants to keep active. ***After the trial***, mentor and mentee pairs, both in the platform and control group were invited to an interview, in order to assess their overall experiences and to discuss possibilities for improvement. The online questionnaire (which was initially planned) was not carried out, because, participants faced that much problems that it was decided to rather focus on the qualitative interviews for those participants, who were still motivated. Moreover, additional interview guidelines were developed for participants, who became active in the beginning, however lost interest to further proceed (for the materials that have been developed see also the Annex).

3.1.2 Recruitment of participants

The recruitment of 15 seniors (mentors) in this pilot was done by NFE, who send out a survey to ask potential users about their experiences in mentoring, how they would like it to work as a mentor, and what they would expect from such a project. Eventually the seniors were asked if they would be interested to participate in our pilot and if they would prefer one of the target group of youngsters to work with. In this way, the survey provided us information about the preferences of seniors and helped us to recruit the mentors. About 500 respondents filled in the survey. Overall, 45 participants indicated their interest to join the pilot; 135 answered that they might be interested if they would get more information. In the weeks before the project, respondents

were approached from these 180 respondents to invite them to join. The selection of mentors to be called will be based on the target group of their interest. The students were recruited by Avans.

3.1.3 Data Assessment

Table 1 provides information about the data assessment for the control group and the platform group, who used the platform.

Table 1: Data Assessment at NFE

Research Questions: Control Group	Data Assessment
RQ1C What are the experiences of seniors and the different groups of youngsters in working towards a goal together	• Biweekly contact by telephone • Interview after the trial
RQ1.1C How do mentor and mentee find it to define their collaborative relationship and MAs?	• Biweekly contact by telephone • Interview after the trial • Content MA set-up at the start
RQ1.2C Which are preconditions for a mentoring program with seniors and (different groups of) youngsters? E.g. Content of training, support during project, ways of communication tools	• Biweekly contact by telephone • Interview after the trial
Research Questions: Users on the platform	**Data Assessment**
RQ1 How does the network structure allow users to successfully work together?	• Interview after the trial • Logging data (amount of mentors/mentee, density in terms of expertise)
RQ2 How do the users overcome the virtual distance when communicating via the platform?	• Telephone Interview • Closing interview • Logging data (frequency of connection via different channels, duration of connection)
RQ3 How does the platform facilitate the development and compliance of norms of cooperation?	• Telephone Interview • Closing interview
RQ4 How does the platform allow mentor and mentee to define the framing conditions of their collaborative relationship?	• Telephone Interview • Closing interview • Logging data (updates with regard to the MA, how often are updates made?)
RQ5 How does the platform support mentor and mentee to work together towards a common goal?	• Telephone Interview • Closing interview • Logging data (updates with regard to the progress tool, how often are updates made? Who is doing the updates? Does the mentor comment on the mentees input?)
RQ6: To what extent does the cultural background influence the negotiation and collaboration process?	• Not relevant in setup 1
Additional data sources	• Demographic data (age, educational level, pre-experiences in terms of mentoring/coaching) • SUS (System Usability Scale) • Logging data (field of expertise, need for advice)

3.2 Setup 2a (EURAG, AGIR, PLUS)

The recruitment of participants in setup 2a happened via the end user organizations EURAG and AGIR via personal contact and various mailing lists (see section 3.2.3). Since the Austrian EUO mainly had access to potential mentors, PLUS took care of recruiting potential mentees, who could take part in the trial.

3.2.1 Procedure

In the run-up phase, participants received overall information about the project via mail. An information event was organized in Vienna and Romania, where participants received information about data recording, data usage, were asked to sign an informed consent, and had the possibility to ask questions. Afterwards, participants, who were interested, were asked to set up a profile on the platform[5] and to search for an appropriate mentor/mentee. Due to problems in the beginning, particularly with regard to the matching system, some users were matched beforehand based on their expertise and interest. ***During the field trial*** users could try out the platform for free and were asked to indicate their experiences with the online platform during short telephone interviews. Telephone interviews were than rather used to answer participants' questions with regard to the variety of technical issues that occurred and to encourage and motivate them to stay active. ***After the trial***, mentors and mentees, were interviewed about their overall experiences. Moreover, an additional interview guideline was developed for participants, who did not stay active.

3.2.2 Data Assessment

In Table 2, we provide a brief overview about the data assessment. Additionally, to specific data in terms of the research questions, we assessed demographic data (age, education level, etc.), technology usage in general, and what kind of different devices participants used when interacting on the platform.

Table 2: Data assessment for AGIR, EURAG and PLUS

Research Question	Data Assessment
RQ1 How does the network structure allow users to successfully work together?	• Interview after the trial • Logging data (e.g., amount of mentors/mentee, density in terms of expertise) • Feedback questionnaire

[5] Initially, it was planned that users register online with their first name, the last name and the email address of the study participants in order to create a unique token for each participant that could be used to create a personalized link to an online survey. Due to the variety of problems in the beginning the online survey was cancelled.

RQ2 How do the users overcome the virtual distance when communicating via the platform?	• Telephone Interview • Closing interview • Logging data (frequency of connection via different channels, duration of connection) • Feedback questionnaire
RQ3 How does the platform facilitate the development and compliance of norms of cooperation?	• Telephone Interview • Closing interview • Feedback questionnaire
RQ4 How does the platform allow mentor and mentee to define the framing conditions of their collaborative relationship?	• Telephone Interview • Closing interview • Feedback questionnaire • Logging data (e.g., usage MA)
RQ5 How does the platform support mentor and mentee to work together towards a common goal?	• Telephone Interview • Closing interview • Feedback questionnaire • Logging data (e.g., usage of my progress, Does the mentor comment on the mentees input?)
RQ6: To what extent does the cultural background influence the negotiation and collaboration process?	• Telephone interview • Closing interview • Feedback questionnaire • Logging data (language)
Additional data sources	• Demographic data (e.g., age, educational level) • SUS (System Usability Scale) • Logging data (expertise, need for advice) • Feedback questionnaire

3.2.3 Recruiting strategy for EURAG, AGIR, PLUS

Participants were recruited according to the profile of the Personas Maria and Susan. Thus, we focused on both target groups, i.e., older adults, who could imagine providing support to younger generations and younger people, who could imagine acquiring support from experienced professionals. The following criteria need to be fulfilled: general interest in getting active as a mentor and mentee, interest in new communication technologies, and computer affinity.

Table 3: Recruiting strategy for AGIR, EURAG and PLUS

Organization/Target Group	Range (approximately)	Main role on the platform	Language	Main area of interest	Recruitment
Students from the University of Salzburg	18.000	Mentees (both)	German/English	Education, learning	Mailing list
Employees at the University of Salzburg (lecturer, etc.)	2.800	Mentors (both)	German/English	Education, learning	Mailing list
University 55+ - older adults, who take part in courses at the University	200	Mentors (both)	German	Education, learning	Mailing list, personal contacts
EURAG Members/Contacts	300	Mentors	German	Different	Mailing list, personal contacts

IBM retirees	1000	Mentors	German	Technology	Mailing list
ASEP	-----	Mentors	German	Economy, management, HR	Mail to be forwarded by the head of the organization
Seniors4sucess	300-400	Mentors	German	HR, Management	Mail to be forwarded to contacts
Personal networks	100	Mentors/Mentees	German/English	different areas	Mailing list
DI Gamauf – connected to WKÖ	-----	Mentors/Mentees	German	Different areas	In discussion with DI Gamauf how to spread the info
WUK Senioren	------	Mentors	German	Different	Mail to be forwarded
AIGR members (individual, collective, supporting)	3500	Mentors/Mentees	English/German	Education, Technology, Management	Newsletter, newspaper, Facebook, personal contacts

3.3 Setup 2b (INV, KH Leuven)

This setup was not implemented, due to the severe problems with the matching system in the beginning that did not allow to search for an appropriate mentor or mentee. It was intended in setup 2b that the Leuven University College and the INV recruit participants via mailing lists and that these participants connect with each other via the platform (for a detailed list of organizations see section 3.3.3). Although this setup could not be implemented we provide in the following information about the intended procedure, recruiting profile, etc.

3.3.1 Intended Procedure

In the run-up phase, participants, receive overall information about the project via Mail and are asked to set up a profile on the platform, which is then stored in a relational database. Using the export function of the database a CSV file including the first name, the last name and the email address of the study participants is generated. This information is subsequently used to create a participants table in the survey tool. After adding a unique token to each participant in the table a personalized link to the survey will be send out. ***During the field trial*** users can try out the platform for free. Data assessment happens via data logging (for details see section 3.2.1). ***After the trial***, participants are asked to fill in a short feedback questionnaire online.

3.3.2 Intended Recruiting Profile

For Setup 2b, it was intended to address a big group of potential end users, basically representing the Personas Maria and Anna. Thus, we focus on both target groups, i.e., older adults, who could imagine providing support to younger generations (provider) and younger people, who could imagine acquiring support from experienced

professionals (receiver). The following criteria need to be fulfilled: general interest in getting active as a mentor and mentee, interest in new communication technologies, and computer affinity.

3.3.3 Intended Data assessment

In terms of the participants, who do not have any direct contact to the end user organizations, it may have been hardly possible to carry out telephone interviews. Hence, most of the research questions would have been answered by means of a feedback questionnaire (see Table 4).

Table 4: Data assessment for INV and UCLL

Research Question	Data Assessment
RQ1 How does the network structure allow users to successfully work together?	• Feedback Questionnaire • Logging data (amount of mentors/mentee, density in terms of expertise)
RQ2 How do the users overcome the virtual distance when communicating via the platform?	• Feedback Questionnaire • Logging data (frequency of connection via different channels, duration of connection)
RQ3 How does the platform facilitate the development and compliance of norms of cooperation?	• Feedback Questionnaire
RQ4 How does the platform allow mentor and mentee to define the framing conditions of their collaborative relationship?	• Feedback Questionnaire • Logging data (e.g., usage MA)
RQ5 How does the platform support mentor and mentee to work together towards a common goal?	• Feedback Questionnaire • Logging data (usage of progress tool, e.g., does the mentor comment on the mentees input?)
RQ6: To what extent does the cultural background influence the negotiation and collaboration process?	• Feedback Questionnaire • Logging data (language)
Additional data sources	• Demographic data (e.g., age, educational level) • SUS (System Usability Scale) • Logging data (expertise, need for advice)

3.3.4 Intended Recruiting Strategy for INV, UCLL

A variety of different organizations were contacted in Belgium and UK by UCLL and INV. Table 5 provides a brief overview on the different organizations.

Table 5: Intended Recruiting strategy for INV and UCLL

Organization/Target Group	Range (approximately)	Main role on the platform	Language	Main area of interest	Recruitment
Seniors4sucess	300-400	Mentors	German	HR, Management	Mail to be forwarded to contacts
Personal networks	100	Mentors/Men	German/En	different areas	Mailing list

		tees	glish		
DI Gamauf – connected to WKÖ	Not known yet	Mentors/Mentees	German	Different areas	In discussion with DI Gamauf how to spread the info
Intergenerational Mentoring Network	50	Mentors/Mentees	English	Supporting pairs of mentors and mentees	Through manager of project
Shaw Trust	100	Mentors/Mentees	English	Supporting companies with an aging workforce	Through specialist advisor
Birchwood Nuclear Forum	250	Mentors/Mentees	English	Different areas	Promotion at forum meetings and mailing list
Research association Mecklenburg	300	Mentors/Mentees	German	Different areas	Mailing list

3.4 Technical Requirements & Restrictions

In terms of technical requirements users only needed an Internet connection and a computer/laptop/smartphone. If technical problems occurred, the first contact person for the participants was the EUO. If they could not solve the problem, they could contact the help desk via email, who responded within one day. Due to technical restrictions of the mobile operating system (iOS, Android), not all features that were offered by the desktop version were available mobile (e.g., data uploads, communication –video/audio).

3.5 Pre-test

Before the actual field trial starts, pre-test with potential end users took part in the Netherlands, Austria and Romania. Based on pre-defined tasks (for a detailed list of tasks see section **Fehler! Verweisquelle konnte nicht gefunden werden.**) users were asked to try out the platform and to provide feedback. Moreover, the user manual (print outs) was provided to the end users and they were asked to provide feedback. Additionally, the data that was tracked in the background (data from the database of the platform and Google Analytics) was analyzed. Overall 2-3 participants per end user organization took part in the pre-tests.

3.6 Data recording

Besides the data that was gathered trough the feedback questionnaires and (telephone) interviews, we gathered additional information about participants' activities on the platform via the database of the ProMe platform and via Google Analytics. The following table provides a brief overview on the sources and information that was used for further analyses.

Table 6: Data recording

Source	Information
Database dump of the ProMe platform	Chat (time stamp, user)
	MA (time stamp, user)
	Information about meetings (type of meeting, time stamp, user involved)
	Age of participants
	Mail address (needed to send a personalized link for the feedback questionnaire)
Google Analytics	Users per period
	Session time
	Origin of participants (we know that anyway)
	Ratio Desktop / Mobile
	Percentage of users who clicked on a specific link
	Bounce and exit rate
	User flow (order of interactions)
	Page statistics (number of views, dwell time)

3.7 Timeline and Responsibilities

In order to support the procedure of the field trials, activities before, during and after the trail and responsibilities for the different partners were discussed and a timeline was defined. Table 7 provides a rough overview of the most important activities and responsibilities. Table 8 shows, what kind of different resources were needed for the preparation and implantation of the pilot study.

Table 7: Timeline and responsibilities

Calendar Week (2017)	Activity	Responsibility
Week 3-5	Concept changes and partner feedback	EUOs, PLUS
Week 5-6	Finalize User Manual	SIVECO
Week 5-9	Preparation of materials required for the study: • Finalize Information sheet for participants • Registration – check requirements for user ID • Set up Feedback Questionnaire • Translation of Feedback Questionnaire • Prepare Guideline for the interviews (telephone, final interviews) • Translate guideline for the telephone interview/final interview • Prepare print-outs for the user manual (for the pre-tests) • Prepare slides for information event	PLUS, INV, EUOs

	• Prepare guideline for information event • Translate information sheet • Check translations for SUS	
Week 6-7	Finalize Development	SIVECO
Week 8-9	Feedback to final version of the platform	ALL
Week 10-11	Pre-tests at EUOs	EUOs
Week 11-12	Final iterations and integrated feedback from EUOs and PLUS	PLUS, SIVECO
Week 12	Information event for participants (Austria, Romania)	EUOs, PLUS
Week 13-23	Field trials, Final interviews take place in KW 23	ALL
Week 24-26	Data Analysis, Final Report, and Deliverable	EURAG, PLUS

Table 8: Resources needed

Human Resources	• Technical support (EUOs and SIVECO) • Harassment system (EUOs and SIVECO)
Equipment	• Tablets • Laptop/Desktop PC In terms of equipment it is intended that participants use their own equipment (laptop, mobile phone)

Materials	• Materials for recruitment (see section 7.1)
	  ○ Information sheet
	• Materials in the run-up phase of the study
	  ○ Guideline for the information event
	• Materials during the study
	  ○ User manual
	  ○ Informed Consent (see section 7.2)
	  ○ Personal Data Sheet
	  ○ Feedback Questionnaire (see
	• Incentive: All mentors, who take part in the study, will receive an Amazon voucher (€25)
	• Materials after the trial
	  ○ Interview Guideline (Telephone Interview, final interview)

4 PRETEST

Pre-tests were carried out to ensure the highest possible quality of the platform before having participants working with it. The tests took part in Austria, the Netherlands, and Romania with slightly different setups. The overall goal was the same in any of those, i.e., to discover potential for improvement. However, the number of participants and the way they achieved the goal differed in each country.

In ***Austria,*** one pair consisting of one mentor, aged 76 holding a University degree and one mentee, aged 45 with a qualification for University entrance took part. The same applies to the ***Netherlands*** where the mentor was 50 and the mentee 19 years old and for both their highest education was the Professional School. The test leaders acted as the collaboration partner of the participants, i.e., if the participant took over the role of the mentor, the test leader acted as a mentee and vice versa. In ***Romania,*** three mentors (aged between 48 and 51) and seven mentees (aged between 34 and 42) took part. All mentees held a University degree and for the mentors it was the same except of one participant who only held the qualification for University entrance. The test leaders gave the participants a short introduction and afterwards a list of tasks and the user manual, which should support them in fulfilling the tasks they were asked to do. The participants worked independently without a collaboration partner but the test leaders were always available for questions.

Additionally, to the testing with potential end users, PLUS carried out internal testing rounds before the start of the field trial (week 11 and week 12) in order to ensure that the issues that were reported to the technical partners were actually solved. Tasks covered registration and login, setting up a profile, Search, Calendar, Tool Pool, Network, Progress and more general use cases such as switching the language or answering to notifications. The full lists of tasks are provided in the Annex (section 8.1).

4.1 Results

The tests revealed a variety of issues. Many of them were related to missing or wrong translations, however, also some serious usability problems were identified. In the following, the most important of them are noted and described shortly. As mentioned earlier the setup was slightly different in Romania, hence, we split the results gathered from the pilots by country.

4.1.1 Results from Austria

First issues already came up when the participants were asked to ***retrieve information about the different roles.*** Both participants did not associate *„How to get active on the platform“* with the roles. Problems were identified with regard to the ***registration process***. A user who used the social login (e.g. via Facebook) struggled when the platform asked him/her to set up a password. S/he was not sure whether to use the Facebook password or a new one. Moreover, one participant faced problems when entering the date of birth. S/he wanted to use the date picker but only succeeded by typing the date manually into the input field. A lot of problems occurred with regard to the ***profile***. One participant was not able to upload a profile picture as s/he

could not find out where to do it. It seems that “Profile Picture“ is not precise enough. The same goes for the functionality to change the user’s password. Also, one of them could not find the profile section where they could change their password, which is located in the “General Account Settings“. Moreover, participants had difficulties to state and edit their availability. Both participants encountered problems when trying to add information about their availability until the end of the day as 24:00 was not accepted by the form. The functionality of the ***calendar*** was quite clear, however when it came to cancelling a meeting, one participant struggled as it was not possible to cancel directly in the calendar view and s/he had no idea how to get the job done at first. After a while s/he found the list of appointments and was able to delete/cancel the meeting.

Most issues, when running the pre-test, were revealed in the ***network section***. The (video)call function was rated poor as both participants were overwhelmed with initiating a call. Several pop-ups are opened which distract the user. S/he has to check whether the latest version of flash player is installed, the camera and microphone is working and switched on and so forth. Further, the pop-up blocker needs to be deactivated for the call function to work. Moreover, besides the weak usability, for both participants it was not even possible to establish a connection with the collaboration partner. One of them repeatedly received the notification that s/he was “the only person in this conference“.

Both participants were overtaxed with the ***progress tool***. The mentee did not feel comfortable when adding a new topic. It was not clear to him/her whether he was doing right or wrong. After successfully adding a new topic s/he failed when it came to adding a subtopic. The entire process did not seem to be clear to the participants. The mentee also could not manage to close a finished topic as it was not clear where to do it and an accurate feedback was missing.

4.1.2 Results from the Netherlands

For one participant, the login did not succeed even though this user already had registered an account, which then was not recognized by the system anymore. S/he was also not able to reset his password due to technical issues. One participant struggled editing the availability, as s/he could not remove the old time-frame and instead received an error message. However, when trying for the second time, s/he finally succeeded. Looking at the progress there was an obstacle for one participant, who could not manage to close a subtopic.

4.1.3 Results from Romania

Not all of the Romanian participants carried out all the tasks given to them. Half of them (five participants) did not try to upload a profile picture since it was not available on the computer and they did not want to use a randomly chosen picture. However, they succeeded in any other task when setting up their ***profile***. As the search function and the recommendation system offered by the platform did not work during the study, none of the participants was able to search for a collaboration partner so they had to use the browser’s search function instead. Problems occurred when searching for a ***calendar entry*** as four of them were confused by „My calendar“ and „New entry in calendar“. Same holds true for trying to cancel an appointment as four participants only searched in „My meetings“ and could not find out how to do it. Three of them faced

difficulties filling in the ***MA***. For the first three fields of the MA, which are filled in separately, the answers of the collaboration partner could not be associated with the questions as the mentor could not see the trigger questions for the mentee and vice versa. When trying to discuss the agreement via call only two participants succeeded, the rest was not able to establish a call as they had trouble connecting to each other. The ***progress*** tool was not tested by the mentors as they did not have any mentee whose progress they could comment on (as they worked independently and were not connected to a mentee). However, all mentees succeeded in creating a new topic in the progress. Regarding the general tasks, e.g. switching the language or responding to notifications all participants managed to succeed.

4.1.4 Internal testing @PLUS

Due to the variety of issues, that occurred when using the platform, PLUS carried out internal testing rounds before the official start of the trial in order to make sure that the platform is running smoothly and that the reported issues from the pre-tests could have been covered by the technical partners. Most issues that were identified shortly before the start of the trials concerned the ***calling***. Thereby, most of the issues were ***bugs or configuration issues***. There was, for example, no ringing audible at the communication partner's side (only at the user's side, who initiated the call), and wrong feedback messages were displayed (e.g., "Your partner closed the meeting", although the tester himself had ended the call). Moreover, some problems occurred with regard to the Flash Player (e.g., an error message that the flash player is out of date, although the user had already installed a new version of Flash). Finally, acoustic feedback/coupling made it difficult to have a conversation of good quality. Unfortunately, also displaying issues came up again, when resizing the window, i.e., some labels disappeared due to wrong word-wrap behavior. Moreover, some issues were identified in the **progress section**. The save buttons were not visible anymore, hence information that was added to the progress could not be saved. Furthermore, the mentor was able to modify the progress area, although s/he should only be able to add comments. The internal testing rounds also revealed a variety of **translation errors and typos**. Although a collaborative excel sheet was set up by the technical partners to avoid that different versions and translations get lost, still a lot of translation issues occurred (wrong or missing translations). **Editing the availability** caused a variety of problems. The possible time frame only ranged from 00:00 to 23.59; 24:00 caused an error for the user. Within the **network area**, the MA suddenly contained wrong trigger questions, hence it was hardly possible to fill in the MA correctly. Finally, the pre-test also revealed **a couple of minor issues** (arrangement of buttons by chance, headings that were overlapping text, labelling of buttons that caused too big buttons that could hardly be arranged nicely on the platform, missing space characters in sentences, no word division by syllables, displacement of buttons, wrong forwarding of links).

All issues that were identified during the pre-tests and the internal testing were analyzed and reported to the technical partners, including additional comments and suggestions for improvement. The full list of issues that were reported shortly before the start of the trial is available in the Annex (see section 8.2 and 8.3). Moreover, in order to avoid misunderstandings, the weekly meetings were used to discuss the identified issues and (where necessary) to discuss suggestions for improvement. Summing up, the pre-test and internal testing round revealed bugs, translation issues as well as usability issues. Since the partners could solve the bugs and major usability issues it was decided to run the trials.

5 RESULTS OF THE PILOT

This chapter is structured as follows: After a brief introduction to the pilot in section 5.1, we briefly describe the data analysis (section 5.2), and provide an overview on the website traffic in section 5.3. Afterwards, all six research questions are addressed, based on the data we gained from the data logs and the interviews that were carried out at the end of the trial (see section 5.4 – section 5.9). The chapter closes with a brief overview on the technical issues that occurred during the trial.

5.1 Introduction

The pilot study started on the 27th of March 2017, involving participants from Austria, Romania and the Netherlands. Participants were recruited by the three end user organizations AGIR, EURAG, NFE and PLUS via various mailing lists, personal contacts, etc. (for more information see section 3). As already mentioned in the beginning, the setups needed to be adapted since the search engine stopped working and did not reveal reliable results and a couple of bugs and configurations issues occurred. Unfortunately, the search function was not working in the beginning of the pilot as the two databases (one at SIVECO's side and one at GLUK's) were not in sync. This was particularly a problem for the participants recruited from PLUS and EURAG, who had already registered on the platform and were eager to start working. Participants could only search for collaboration partners using the built-in browser search. However, the issue could be solved four weeks later. Unfortunately, another issue came up due to changes in a 3rd party API (Facebook). Hence, the Facebook log in was not available for a couple of days. Moreover, due to some configuration issues, participants did not receive any notifications anymore. Theses variety of issues were also a reason, why INV and the KH Leuven decided that no further organizations should be contacted until everything works fine. Hence, we only went for study setup 1 and study setup 2a. Additionally, since a variety of participants dropped out in Austria, due the problems with the matching systems and error messages, additional participants were recruited in May 2017, when the engine worked again properly and all severe issues had been solved.

Besides the problems that occurred in the beginning of the field trial, overall 25 issues were identified, twelve of them resulted from poor usability, eleven from technical problems (bugs), two needed to be classified as both, usability and technical issue, as the user did not understand the platform's behavior due to receiving an incomprehensible error message. Additionally, typos/mistranslations were identified. The network area caused one third of the problems (particularly the progress, MA, and the mail feature). Almost one third occurred dealing with notifications (receiving or responding to them). The last third can be split up into issues found in the search, profile and when requesting and/or deleting contacts.

Most of the issues mentioned did neither appear in the pre-test nor in the internal testing carried out at PLUS, EURAG, NFE and AGIR and could, therefore, not be avoided. However, not to unnecessarily bother the user, SIVECO was available to quickly rework and solve the problems as they appeared. In the following, we will describe the central results from the trial, whereby we will start with some more general information about

data usage based on the information we could retrieve from Google Analytics and some user statistics from the data logs. Afterwards, we will answer the central research questions (see section 2.2).

5.2 Data Analysis

As already described in section 3, data assessment happened via ***Google Analytics, data logs*** as well as ***structured interviews*** at the end of the trial. Consequently, these data were the main source for the analysis. The telephone interviews that had been initially planned to gather information about participants' experiences, were basically used to clarify open issues. Moreover, the online questionnaire that had been developed (see section 7.3.1) particularly for those users, taking part in the study, who could not be reached via the end user organizations, was not used, since study setup 2b (see section 3.3) could not be implemented due to the problems in the beginning with the matching system.

The analysis was done stepwise, whereby we will describe the most important steps in the following:

1. **Revision of raw data.** First, the raw data was revised, in order to exclude data from test users/test accounts. This was done for the data from Google Analytics (as far as possible) and for the data from the logs.
2. **Data Analysis from Google Analytics.** In a second step, the data from Google Analytics was analyzed to gain a rough overview about the traffic on the platform. This data was descriptively analyzed, extracting information about the overall number of sessions, the pages that were retrieved per session, the average session duration, bounce rate, terminal devices used, and browsers that were used during the trial. Data interpretation happened based on the E-Commerce KPI Benchmark 2016 [6] carried out by Wolfgang Digital, a digital marketing agency based in Dublin, Ireland. They analyzed 87 million website sessions and €230 million in online revenue from their participant websites (being travel and retail). This data provides a more general overview on the platform usage.
3. **First data preparation of data logs and qualitative interviews**. In a third step, the data logs as well as the interviews were assorted. Thereby, we came to understand that we needed to distinguish between different "types of users", i.e., users who registered and were involved in a contact request, and users, who became active and did not become involved. Among the users, who were involved in a mentoring relationship, we could again distinguish between users, who were quite active, and users who were rather inactive.
4. **Quantitative analysis of data logs.** Data from the data logs, was descriptively analyzed, using Excel. Thereby, we explored the different user groups (registered in an approved relationship, registered without an approved relationship, etc.) based on ***demographic data*** (age, gender, origin), ***usage of the different tools*** (data and time), i.e., calendar, progress, mutual agreement, and ***relationships*** (contact requests including the status and time of the data request) and with whom participants connected. Data logs, were

[6] https://www.wolfgangdigital.com/uploads/general/eComKPI2016-Public2.pdf

particularly important to answer RQ1, (structural aspects of the platform), however, this data was also used to better understand the insights we could gain from the qualitative interviews.

5. **Content Analysis.** Finally, a quite important resource for the data analysis was the data we could gain from the qualitative interviews, which were carried out at the end of the trial. Thereby, it is worth to mention that we did not only interview participants, who were quite active and could manage to set up a collaboration with somebody else, but also participants, who did not become active. The interviews were analyzed by means of a content analysis, based on Mayring (2011). Thereby, the analysis was basically leaded by the research questions (particular RQ2-6). For each of the research questions we defined means for operationalization, that supported us to define and identify particular key words, on which we focused during the analysis phase. Two researchers were involved in this phase, who analyzed and discussed the data. The insights we gained, were also enriched with data from the data logs, hence step 4 and 5 took part in parallel.

5.3 Insights from Google Analytics

In order to gain a brief overview on the website traffic, we used Google Analytics, which allowed us to gather information about the amount of sessions that were counted during the usage period, the average session duration, and the number of pages per session. Data was tracked from the beginning of the study on the 27th of March until the 5th of June, hence was gathered over a period of 10 weeks.

Figure 2 reveals that most sessions were started in Austria (302) and only about half as many in the Netherlands (164) and in Romania (178)[7]. According to that, it seems that participants in Austria were more active (i.e., logged in on the platform and interacted with it more often) than in the Netherlands and in Romania[8]. The huge amount of accesses in Austria can be particularly explained by the fact that participants in Austria were quite active in the beginning and eager to find a collaboration partner and due to the problems with regard to the matching and notification tried a couple of times to become active and to find an appropriate collaboration partner. In Romania and the Netherlands, some participants were already matched beforehand, hence there was not that much effort required to find a collaboration partner via the platform.

[7] There were overall 412 accesses from SIVECO in Romania and 160 accesses from PLUS in Austria, which are already adjusted in the total number of sessions during the whole runtime of the study. Employees of SIVECO and PLUS accompanied the field trials and, therefore, continuously had to visit the website of the ProMe platform. Unfortunately, Google Analytics does not allow us to exclude these additional accesses for the calculation of pages per session, average session duration and the bounce rate.

[8] Further information about how sessions in Google Analytics are defined are provided in the Article "How Count of Sessions is calculated" https://support.google.com/analytics/answer/1032796?hl=en

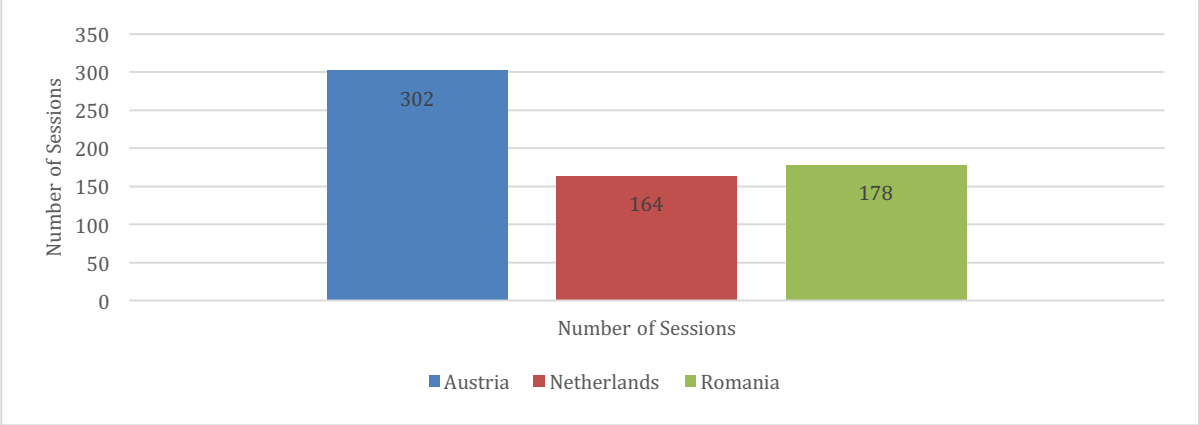

Figure 2: Number of total sessions

The number of pages per session, as shown in Figure 3, is very different in the three countries. The same applies to the average session duration (Figure 4) where the longest duration was measured in Romania (16.12 minutes). However, it must be considered that additional accesses from PLUS (in Austria) and SIVECO (in Romania) could not be eliminated. Due to the further development and bug fixing of SIVECO during the field studies the value in Romania is probably too high. The average value for the pages viewed per session according to Wolfgang Digital is six pages. Hence, the values we identified, are much higher. This might indicate that participants explored the different areas on the platform, by switching between the different pages.

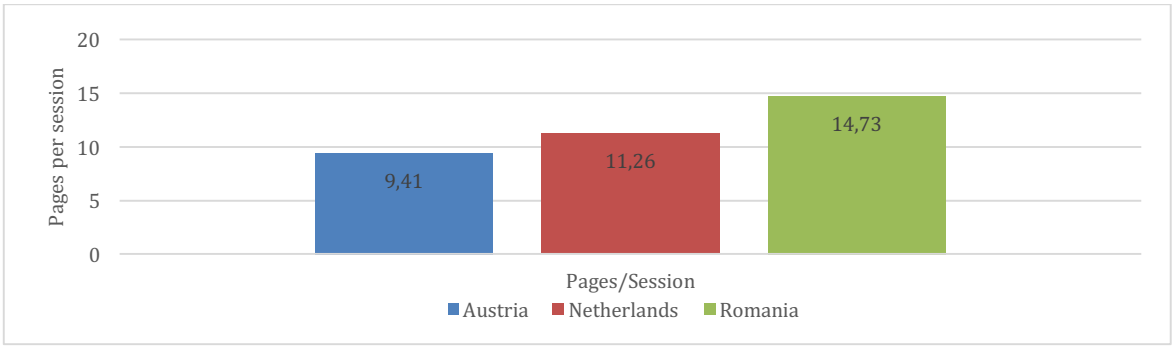

Figure 3: Pages per Session

According to the average session duration of 3:36 min measured by Wolfgang Digital the results from the data we gained through Google Analytics are very good. It means that participants stayed on the platform for a long time, but does not tell anything about the quality of their stay, i.e., whether they interacted with the platform or not. However, it can also be an indicator that it was not that easy for participants to quickly perform an intended task, due to bugs and usability issues that occurred.

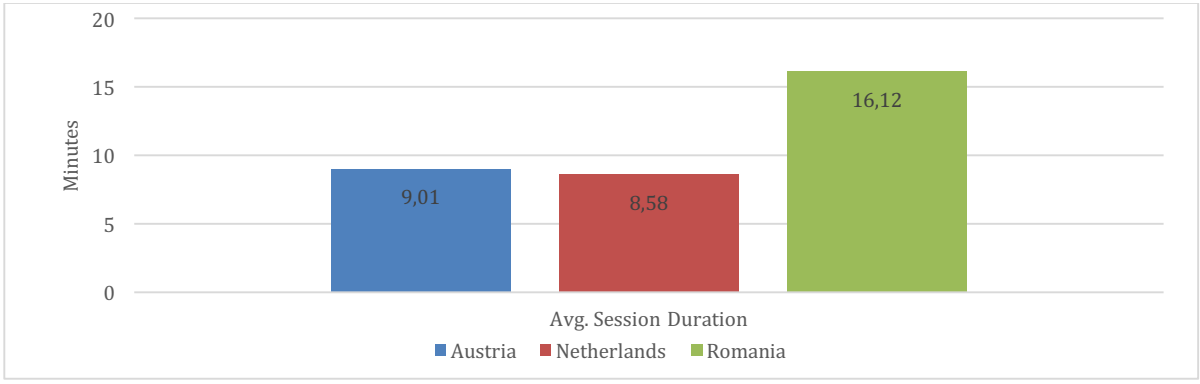

Figure 4: Average session duration

In Romania, only more than one fourth dropped out on the first page they visited, in Austria the bounce rate was almost as low. An even better value was reached in the Netherlands, whereas the average session duration was the shortest. The average bounce rate according to the data set of Wolfgang Digital was measured 36%. According to this, our data indicates that participants were either quite interested in the platform's content or did not find what they were searching for at first glance.

Almost all participants used the desktop computer to access the ProMe platform, the usage of mobile devices is negligible. This may result from the lower usability on these devices and the missing Flash support on iOS devices (see Figure 6).

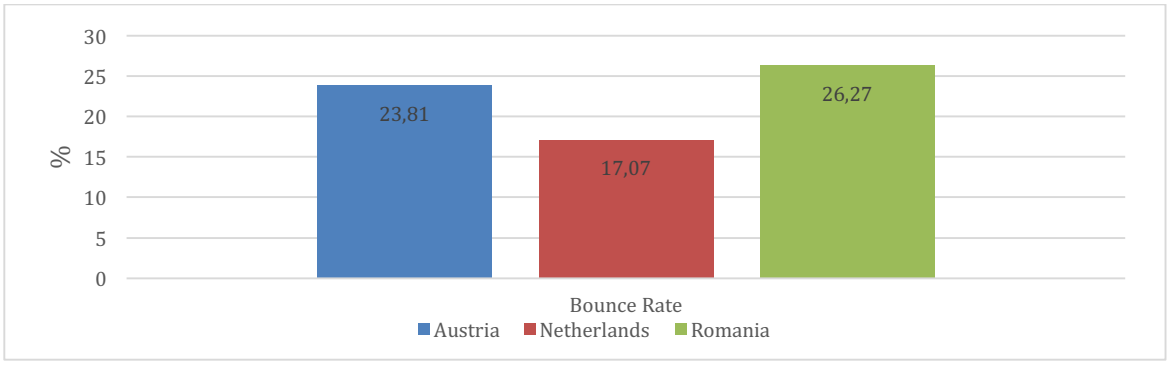

Figure 5: Bounce rate

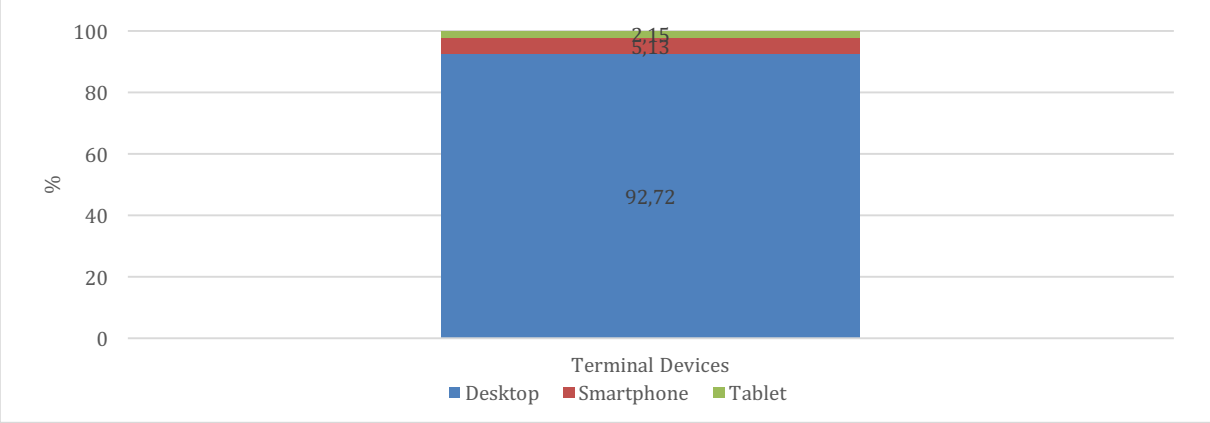

Figure 6: Terminal devices used

Two thirds of all accesses were from Google Chrome browsers. Surprisingly Safari is ranked higher than Mozilla Firefox, which may be due to the fact that it is pre-installed on OS X and iOS devices and Google Analytics shows the added value of desktop and mobile devices. The amount of accesses from other browsers is vanishingly small (see Figure 7).

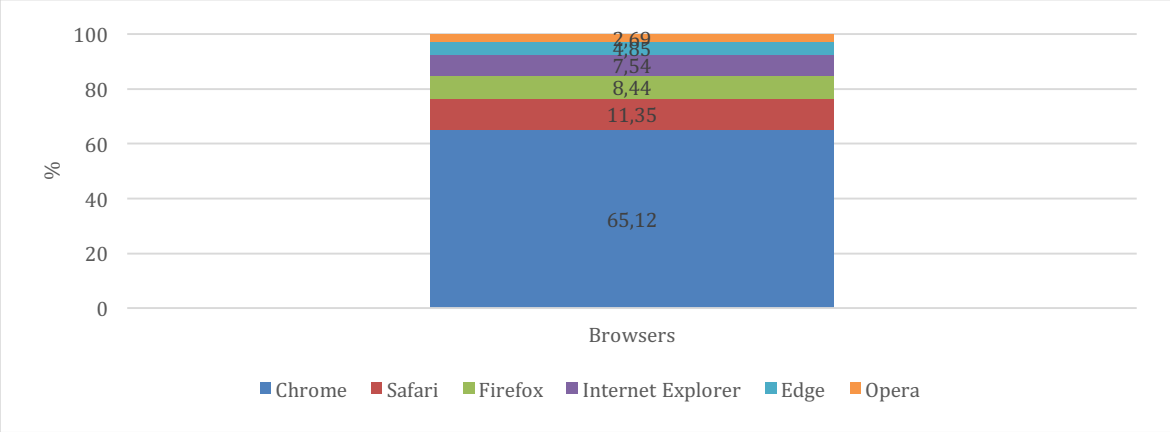

Figure 7: Browsers used

5.4 How does the network structure allow users to successfully work together (RQ1)?

With this research question, we aimed at investigating the properties of the ProMe platform as a whole, i.e., the ***network relations*** and ***components of the social network***. Hence, in the following we will describe the impersonal aspects of social connections, i.e., the way users connected to others and to whom. In principle, we could identify two different categories of users: registered users and users in an approved relationship. Moreover, among the users in an approved relationship we could identify users, who were quite active and could benefit from a relationship and users, who were not active.

Registered users, showing a general interest to become active by setting up a profile on the platform. Hence, we can assume that these users intended to get in contact with other users by being a mentor or a mentee. However, not all of these users set up a relationship with a mentor or a mentee. ***Users within an approved relationship*** could finally manage to set up a relationship with a mentor and mentee (see Figure 8). The results show that almost half of the participants, who registered (47,2%) were finally in an approved relationship. In the following, we will briefly describe both groups of users in more detail.

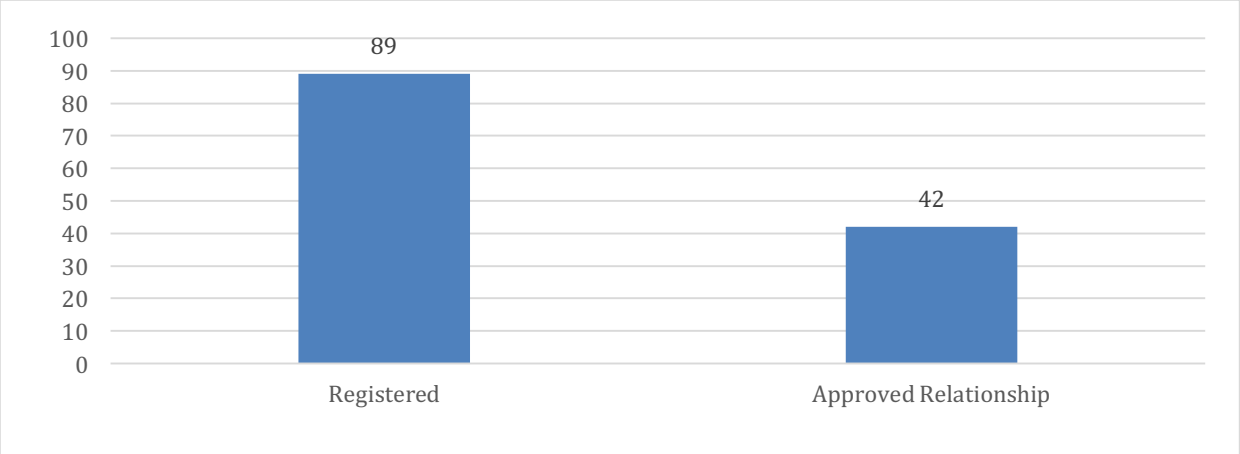

Figure 8: Types of users on the platform

5.4.1 Registered Users on the platform

Among registered users (n=89), 48,3% were male and 51,7% were female. Almost one third of the participants (30,3%) did not indicate any information about expertise or need for advice, i.e., had an incomplete profile; almost two thirds (69,7%) had a complete profile. Registered users were between 18 and 87 years old (M= 52, SD=18). Figure 9 shows that the group of registered users, who were older than 60 years encompasses 40%, hence it can be assumed that there was a great amount of primary target users, who were in the transition to retirement and beyond.

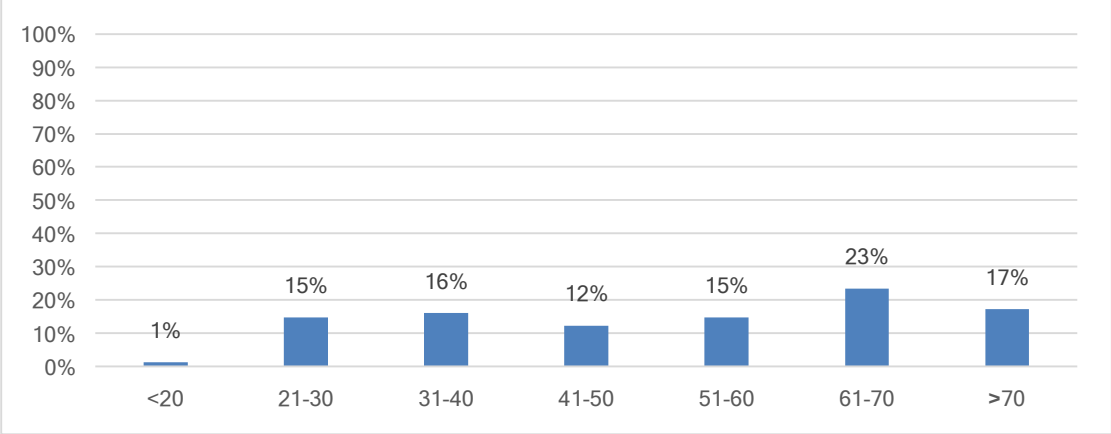

Figure 9: Age groups registered users

The majority of participants (40%) were from Romania, 29% of the registered users were from Austria, 20% from the Netherlands, and 10% were from other countries (Germany, Greece, Belgium, United Kingdom, Ireland) (see Figure 10).

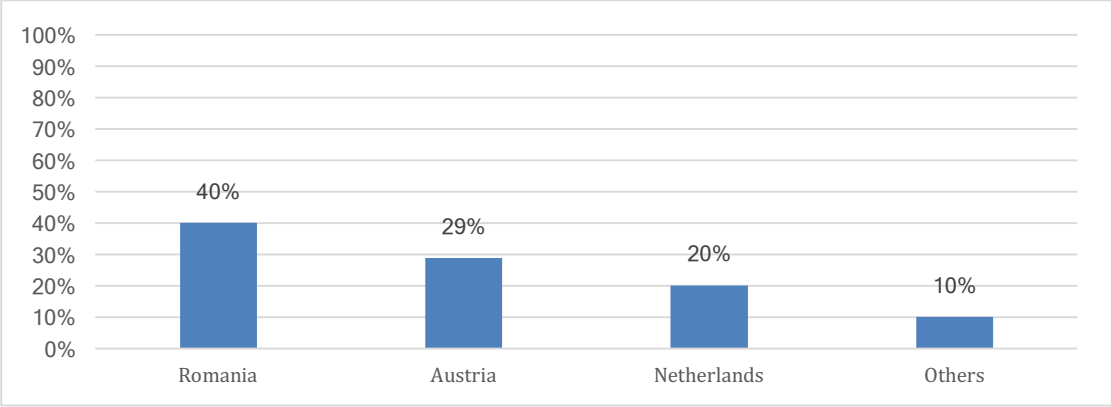

Figure 10: Origin of registered users

In order to get in contact with a mentor or a mentee, users needed to send a contact request, asking a user, if s/he would be willing to take over the role of a mentor or a mentee. Overall, 31 contact requests were sent, involving 47 users on the platform[9]. Hence, more than half of the registered users were involved in the process of getting connected with other users. Finally, 24 contact requests were approved (6 requests remained pending and 1 contact request was rejected; see Figure 11). Hence, we could identify ***42 users on the platform, who were in an approved relationship***. These users were involved in 24 mentoring relationships (pairs). This means that 6 users were involved in a second relationship.

[9] It needs to be considered that some participants were matched, due to the fact that the technical problems with regard to the matching system that allowed participants to search for an adequate mentor/mentee, could not be solved with the start of the field trial.

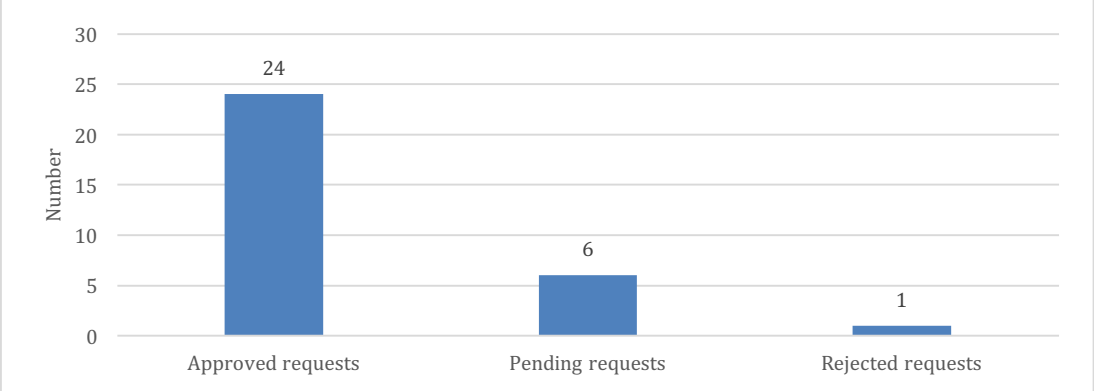

Figure 11: Contact requests (n=31)

Among the 89 participants, 56,2% (n=50) indicated that they would be active as a mentor, i.e., could provide expertise for others, while, 43,8% (n=39) indicated that they were searching for advice. Hence, in general, there were slightly more mentors available on the platform than mentees. Moreover, users who were searching for advice in a particular area, could potentially find somebody, who had expertise in this field. Figure 12 shows the indicated expertise and interest that were mentioned most often.

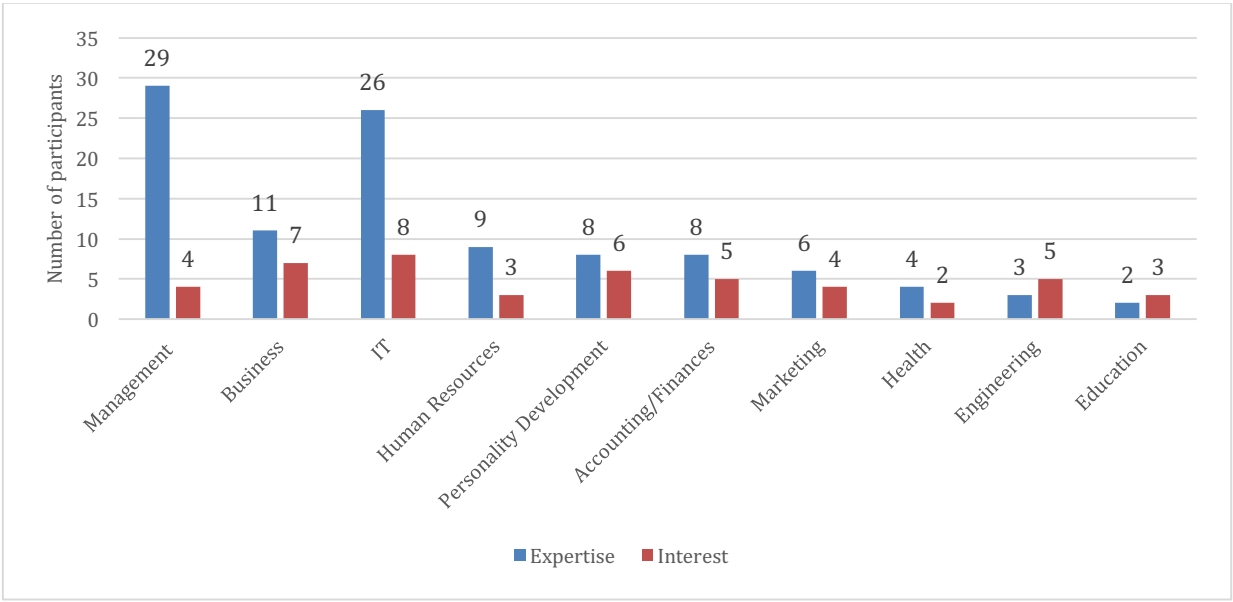

Figure 12: Areas in which participants had expertise/were searching for advice

5.4.2 Users in an approved mentoring relationship

Users in an approved relationship (n=42) were on average 52 years old (SD=20). Almost half of them (44%) were 61 years or older, matching the primary target group, i.e., older adults in the transition to retirement and beyond (see Figure 13). Two thirds (64%) were female and one third (36%) was male.

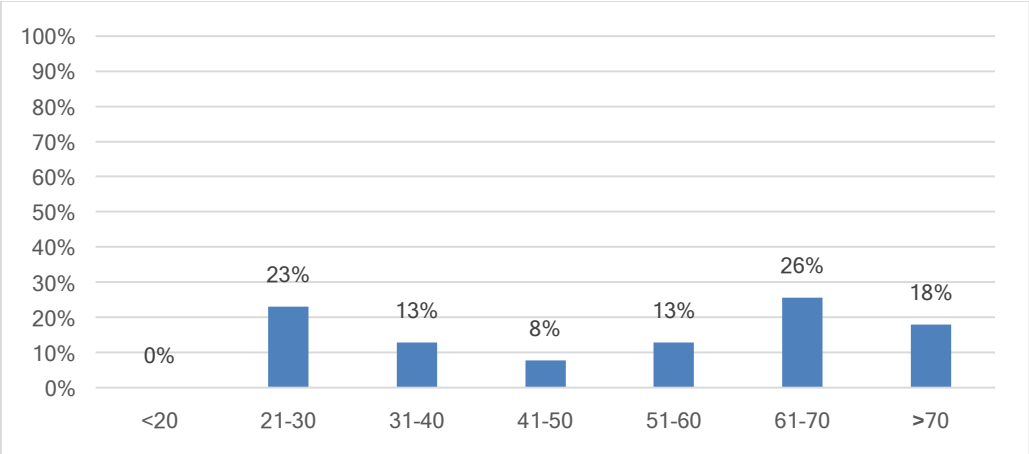

Figure 13: Age groups for active users

More than half of the participants (22) who were in an approved mentoring relationship were from Romania, almost one fourth (n=10) was from Austria, and also almost one fourth (n=10) was from the Netherlands. There haven't been any users from other countries (see Figure 14).

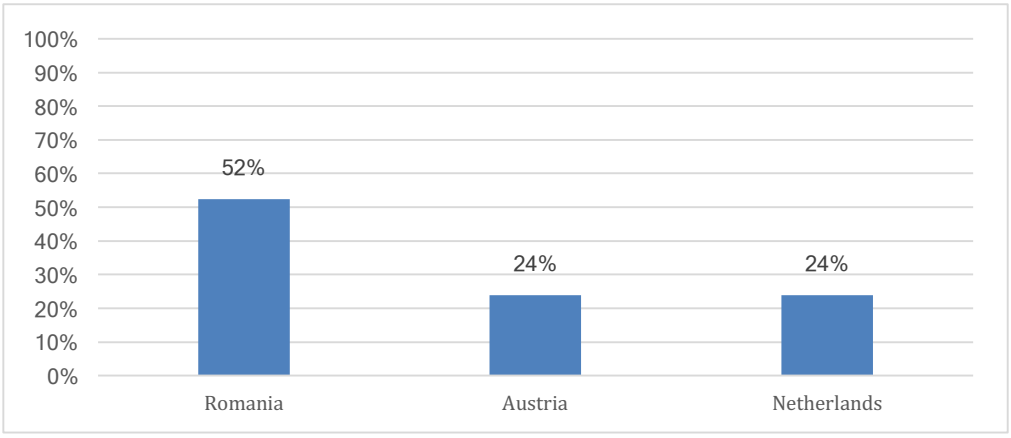

Figure 14: Origin of active users

As already mentioned before, not all of the users who were in an approved mentoring relationship were actually collaboratively working together. Among the 42 participants, 26 users (61,9%) successfully worked together and 16 (38,1%) were somehow active (e.g., tried out some tools) on the platform, however did not actively work together with their collaboration partner, which had a variety of different reasons. Hence, we see that among those users, who managed to be in a collaborative relationship, almost two thirds were actively working together (see Figure 15). It is also worth to mention that from the 16 pairs, who were in a collaborative relationship, 10 pairs can be considered as intergenerational relationships, 4 pairs cannot be considered as intergenerational (age difference between 6 and 16 years) (in 2 cases, one of the pairs had not indicated his/her name). Hence, almost two thirds of the active pairs can be considered as intergenerational relationships.

In the following, we would like to point out a few reasons, why users did not become or stay active on the platform.

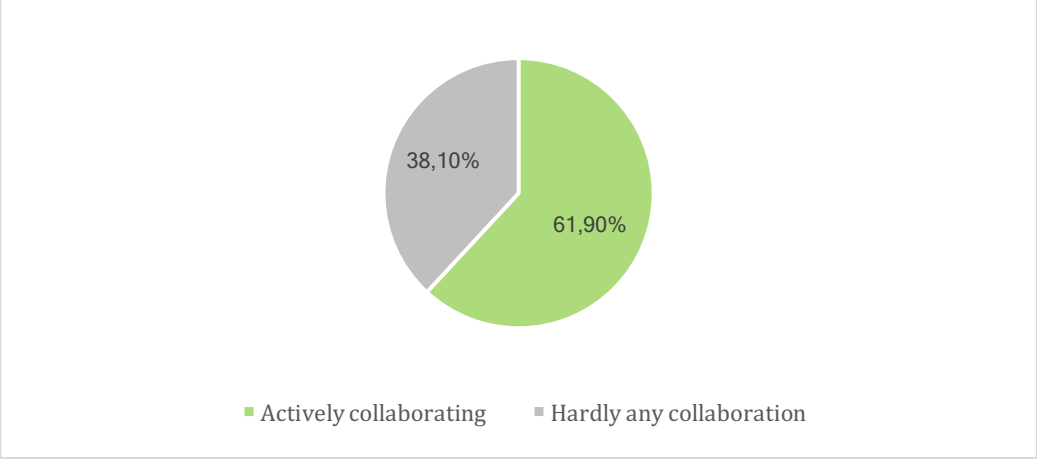

Figure 15: Active and inactive users

5.4.2.1 Reasons why users in an approved relationship did not become/stay active

Out of overall 16 participants, who did not become or stay active (although being in an approved relationship), 10 participants were willing to take part in a short interview after the field trial. Based on this information and the data logs, we could identify a variety of different reasons for their inactivity.

One hurdle was of course the ***technical problems with regard to the matching system*** that could not be solved until the beginning of May 2017 and made it difficult for users to establish the first contact, who were not matched beforehand (participants from Austria and Romania). These users needed to scroll through the different profiles to find an appropriate collaboration partner. Moreover, the ***lack of notifications (for a new contact request, etc.)*** in the beginning was a reason why some participants lost their interest to stay active, which is also reflected in the logging data. If we compare users, who were matched beforehand and users, who were not matched beforehand, we see that among participants, who were matched, only less than one quarter (23,5%) did not stay active, whereas among participants, who were not matched, almost half of them (48,0%), dropped out and could not set up a collaborative relationship (see Figure 16). Moreover, we see that among participants, who became active by beginning of the trial (March/April), there was a higher drop-out rate, than among participants, who became active when at least some technical issues had been solved (beginning of May 2017) (see Figure 17). Hence, technical problems in the beginning of the trial made it difficult for some users to get started and to stay active. Moreover, some participants reported about bugs (resulting in error message, whereof not all of them could be reproduced), and delays.

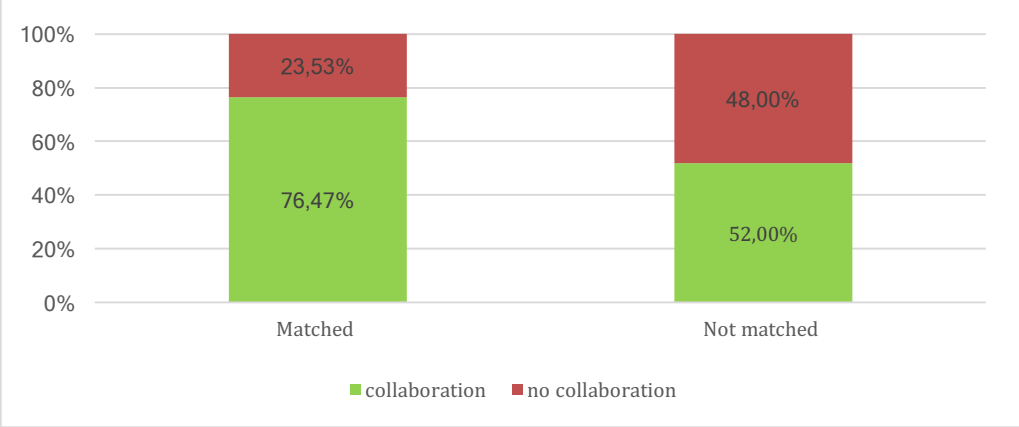

Figure 16: Drop-out rate among participants who were matched/not matched

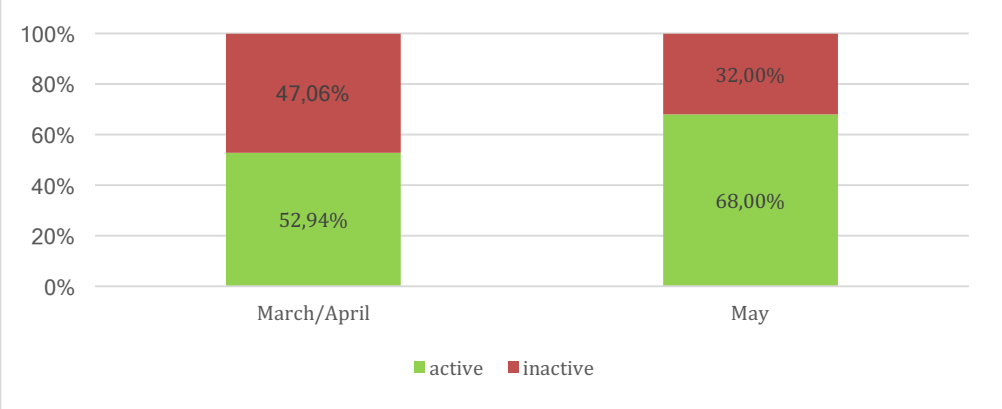

Figure 17: Drop-out rate of participants who started in March/April compared to May

In general, participants indicated that not all functionalities on the platform were working. In the following, we would like to provide a few quotes from participants to illustrate the variety of different problems. *"Everything took quite long and the functionalities did not really work"* (TP5). "*Particular the start was really difficult. I needed to find out through trial and error what to do. It took me a lot of time to become familiar with the platform* (TP8). Another participant pointed out that s/he lost interest to stay active because s/he did not receive any notifications about what was going on (e.g., if there was a new contact request) "*It took me some time until I found out where I could find new messages (contact request) I would have expected that I receive a message for that … I would have expected more support via the platform to get in touch with other users. It is not fun to search for new messages. Nothing was going on and I lost interest."* (TP12) One participant mentioned problems with regard to mail. *"We had difficulties to stay in touch due to problems with the mail (it seems that he did not receive my mails)*" (TP10) Confusion was caused due to the fact that mails did not work like expected. Users could send mails via the system, which were send to the mail address with which the user was registered. However, the mail address of the sender was a computer-generated address (only used to send notifications). Hence, if a user responded to the mail, the sender never received a message.

Besides the technical issues, some participants also reported about ***interpersonal issues***. One mentor, for example, said that his/her mentee was not quite responsive and too busy with exams. The mentor could not support him/her in this situation. Hence, the collaboration was not successful. In another relationship, the mentee was not reliable and every time they had an appointment, the mentee cancelled it. Moreover, the mentee was not satisfied with the approach the mentor suggested. Hence, they could not collaborate with each other successfully due to differences regarding their expectations.

Finally, ***lack of time*** was identified as hurdle for participants to become and stay active. One participant, for example, seemed to be enthusiastic in the beginning to receive support from a mentor in the field of accountancy, however s/he was quite busy with courses and learning and finally this participant thought that the additional effort s/he needed to invest to stay active on the platform was not really an added value. Lack of time was the reason for another pair that they did not actually collaborate with each other.

Hence, we can sum up, that a variety of technical issues as well as interpersonal discrepancies and lack of time were identified as hurdles for inactive participants to become and stay active on the platform.

5.5 How do users overcome the virtual distance when communicating via the platform (RQ2)?

With regard to RQ2, we were interested how users established first contact, how they regularly got in contact with each other, to what extent they were satisfied and the frequency of meetings, to what extent they felt closeness or connectedness with each other, and how they would define the quality of their relationship. This research question is basically answered by means of the qualitative interviews and focuses on those 16 pairs, who were actively working together (16 pairs).

In most of the cases, the ***mentee established first contact***. In 12 cases, the first contact was established by the mentee; in 2 cases the mentor established the first contact and in 2 cases it was not clear anymore, who had established the first contact. Half of the participants established the first contact via chat, 5 participants wrote an email, 3 made a phone call, 1 sent an SMS, 1 used WhatsApp and in 2 cases it was not clear how the first contact was established. Hence, not all of the participants established the first contact via the communication tools provided by the platform. It needs to be mentioned that the mentors appreciated the possibility to send a contact request to a mentee, i.e., that not only users with a need for advice could become active, but also users, who rather considered themselves as mentors.

In order to get in contact with each other and to collaboratively work together, the platform provided a variety of tools. For communication purposes, users could either get in contact via text chat or audio/video call. For collaboration purposes, the platform provided a calendar that allowed participants to manage their appointments, the MA encouraged participants to reflect upon their expectations and needs and supported them in defining goals, and a progress tool, which offered the mentee the possibility to document his/her progress (the mentor could make comments). Only one of the active users did not use any tools at all during the course of the relationship. The tool that was used by the majority of users in each country was the MA.

Almost all participants used this tool. More than half of the participants were at least once in contact via chat Figure 18 shows the percentage of active users, who used the different tools and who did not.

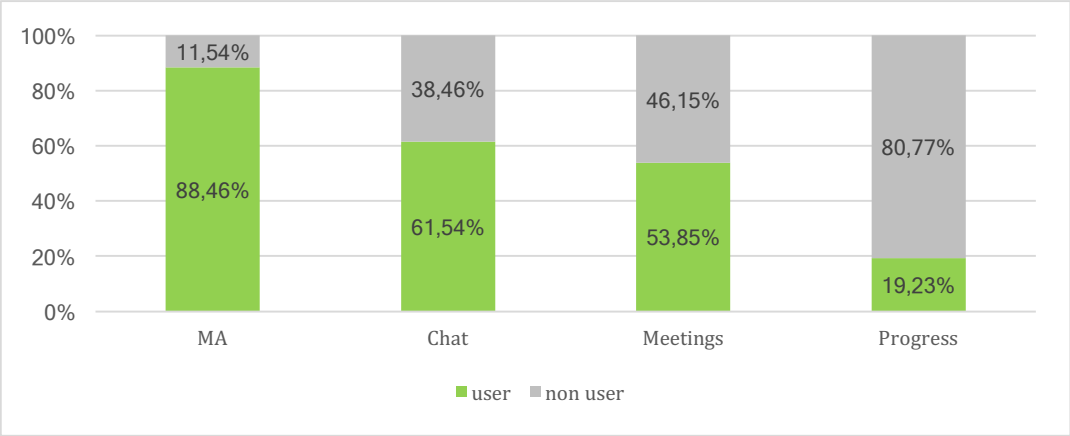

Figure 18: Collaboration Tools used

Almost all pairs (except of two) used alternative ways to stay in contact, such as phone, personal email, Skype, WhatsApp, SMS. Some pairs also met face-to-face. Almost all of the pairs (12) exchanged their personal telephone numbers and stayed in contact via telephone. Moreover, a great amount of the pairs (10) were in contact via personal email. Two pairs additionally used Skype and WhatsApp, and one pair indicated that they were in contact via SMS. Four pairs met each other face-to-face during the duration of the study; one pair indicated that the meeting had changed something within their relationship.

Almost half of the participants, who were active (11), indicated that the communication tools were poor. This particularly had to do with the bad quality of the video, which can be illustrated with the following quotes: *"Video tool would be good if it works properly"* (TP16) *"I accepted the request and at the date of the meeting we had a first video contact. But it did not work well. It was interrupted or the image remained blocked"* (TP17). *"The audio/video session did not work well. We exchanged personal contacts, phone and personal mail."* (TP22) *"You can use the video chat but that's not easy to talk"* (TP23). These difficulties seemed to consume also a lot of time *"We used WhatsApp and called each other. That worked out well and saved a lot of time."* (TP19) Moreover, participants experienced difficulties to reach each other. Since the notifications did not work very well participants had difficulties to get in contact via the platform. *"Via the Platform, the messages not always reached each other, so we switched to the normal e-mail."* (TP21)

Although the participants experienced a variety of problems to stay in contact via the platform, ***all participants reported about positive experiences with their collaboration partner***, i.e., that they could set up a fruitful relationship, from which both parties could benefit. Mentors, for example, reported that they were happy to see that they could help somebody else, e.g., *„It was good to see that I could help somebody else. "* (TP7) *"Halfway the mentee had a tough period, her mother was very ill and she was very sad. At that moment, I could support her well. Meaning something for her was for me a positive highlight."* (TP18) Also, the mentees reported that the collaboration with the mentor was useful *"I needed advice and have been at the right place"* (TP16) *"It was a quite personal relationship …. The email really shined of happiness* [the mentor expressed that he felt with the mentee] *and that was really nice to see."* (TP19) *"It was good to have somebody to ask critical*

questions; the mentor asked questions nobody asked me before" (TP21) *"I immediately felt better. A good feeling! I think the mentor helped well"* (TP24). "It was a good professional collaboration" (TP47). Three pairs indicated that from their perspective they were still at the beginning of their relationship and that they would wish to continue.

Moreover, the closing interviews revealed that most of the participants were ***satisfied with the frequency of meetings***, although the intervals were quite diverse and reached from twice a week to once in two weeks. We found out that frequency does not have necessarily something to do with the productivity or success of the mentoring relationship. This can be illustrated with a quote from a participant who indicated that "*We did not meet very frequently but the meetings were constructive"* (TP1). However, one participant said, that s/he would have liked to have more meetings: *"I did not have that much time to get involved as I wanted to"* (TP11).

5.6 To what extent does the platform facilitate the development and compliance of norms of cooperation (RQ3)?

With regard to this research question, we aim at assessing to what extent the platform supported its users to hold on to their obligations defined in the MA tool, i.e., ***if they could reach the defined goals***. Moreover, we were ***interested to what extent the quality of the relationship*** (subjective experience) ***influences the compliance of norms of cooperation***.

In terms of the achievement of goals, it needs to be considered that 10 pairs were still working with each other at the end of the trial and, hence, indicated that they had only partly achieved their goals. All of these pairs said that they would like to continue and that the experiences they made so far were positive. For example, "*My goal was to decrease my performance anxiety and I think my mentor helped well in that. I'd like to keep in touch with my mentor."* (TP24*) "I did not finish, but there were many points reached. We continue our collaboration."* (TP47). *"I have formed an opinion about what this type of online relationship means, it is a beginning of collaboration that we want to continue with."* (TP27) Moreover, participants reported about positive 'side effects', for example, *"I learned something about the person. This was an additional positive effect."* (TP7) *"Both parties evolve over time … We expanded our expectations."* (TP17)

Six pairs could achieve a goal, one mentee for example, was supported during her graduation phase and the mentor was happy that s/he could support him/her in this time. Another mentee needed help to take a decision about his/her future. "*The result is that I now thought deeper about my decision to do another study or not. I actually already knew what I wanted, but my mentor did me cut the knot. So, for me that was positive.* (TP21) *"I have found solutions to the problems I encountered in the work project."* (TP45). The other pairs did not talk about details of the goal they achieved.

Ten pairs indicated that they would like to continue, three that they would like to keep in touch. Two pairs did not say anything about a future collaboration and one person, who was in a relationship where they had already reached their goals, said that s/he was willing to further collaborate in a different context.

It seems that the platform itself did hardly support participants during their collaboration. As already outlined before, the progress tool that should have helped the mentor and mentee to keep track of the steps achieved

during the collaboration was rarely used. Only four participants (mentees) of the active users made one or two entries, however, did not make any updates. Moreover, the tool was not used in collaboration with the mentor. Also, the communication tools provided on the platform were hardly used and participants found alternative ways to stay in touch with each other, e.g., Skype, WhatsApp, personal telephone. Nevertheless, a majority of these active users indicated that they would like to continue or at least wish to keep in touch, which indicates that they had established a basis they would like to build on.

Difficulties that were identified with regard to the compliance of norms of cooperation were in particular the ***lack of time.*** More than one third of the participants (9) indicated that the duration of the study was too short and that they somehow run out of time.

5.7 How does the platform structure allow mentor and mentee to define the framing conditions of their collaborative relationship (RQ4)?

In order to answer this research question, we explore ***how users organize the first phase within their relationship***. We investigated how they negotiate expectations and obligations, to what extent the MA supports them in terms of this activity and if they could reflect upon and define the framing conditions of their relationship. Moreover, we explored which ***communication channels*** mentor and mentee use to get in contact in the early beginning of their relationship. Moreover, we aim at exploring if users regularly update their MA during the course of the relationship.

As already outlined before, most of the participants (88,46%) used the MA; actually 21 of the participants said during the interview that they used the MA tool during the collaboration. Only five participants indicated that they did not use it at all, either because the goals had been clear at the beginning or did not feel the need to fill it out - *"I do not know what it would have helped additionally"* (TP11). One pair indicated that they did not have enough time to define some goals, because they started too late with their relationship.

Almost two thirds (17) said that they think that the MA is useful and that it provided guidance which can be illustrated with the following statement: *"It was useful because it has given us a little guidance on what to expect"* (TP17), *"The MA was like a guide that helped us to structure our mentoring."* (TP34) Moreover, some participants pointed out that it was helpful to sort out a few things in the beginning and to gather more information about the collaboration partner, e.g., *"… it was useful to gather more information"* (TP27), *"it is good to have a few things outlined in advance to know what to expect along the way."* (TP36) *"It is a practical way for the first step."* (TP20).

The MA was basically used once, to set up the framing condition of the collaboration, however was afterwards not modified anymore. Hence, the MA tool supported participants to start up their relationship and to discuss expectations particular in the beginning and was considered useful by the majority of the participants taking part in the field trial.

5.8 How does the platform support mentor and mentee to collaboratively work together (RQ5)?

In RQ5 we focus on gathering an overall understanding how users organize the collaboration during the course of their relationship, e.g., how the progress tool supports them in keeping track of the activities that are going on, or to what extent the calendar and notifications support mentor and mentee, and if the tool supported them to reach their defined goal (if they hold on to obligations and if expectations were actually met). Moreover, we are interested to explore which other tools are considered useful and to what extent are users ***satisfied/dissatisfied*** with the "my progress" tool.

With regard to the overall collaboration process, participants indicated positive as well as negative experiences. In general, participants appreciated the *idea of the possibility* to talk via audio/video, because it could support a feeling of being connected. However, a lot of participants indicated that the communication tools in general were poor, which was also the reason why a lot of pairs were using alternative ways of communication to stay in touch and to work with each other (see also RQ2). This seemed to be the most critical issue with regard to collaboration and fortunately, participants found their own way to get and keep in touch with each other in order to continue the collaboration.

Participants also positively mentioned the idea of the calendar that allowed them to directly set up an appointment. However, it needs to be considered that only half of them used this tool. Moreover, participants liked the skill profile that made it easy to find an appropriate collaboration partner on the platform.

Participants also indicated that they missed functionalities on the platform, which they would consider useful for a successful collaboration, e.g., a chat history, that allows to retrieve old conversations, a possibility to document the process (which indicates that not all users were aware of the progress tool), a possibility to upload documents or to attach document to an email, to integrate the calendar with their personal calendar, the data transfer when logging in from existing social network sites and useful notifications, provided, for example on an app.

Overall, the platform did not support the participants quite well during the overall collaboration process, because the tools for communication that would have provided added value (video communication) did not work and it was easier for the participants to use their smart phone or personal email to stay in touch. Moreover, the progress was hardly used, because it was too complicated and difficult to use and did not provide any added value. Furthermore, participants missed functionalities on the platform, e.g., a chat history or the possibility to sync the calendar with their personal calendar.

As a suggestion for improvement, to support the collaboration between mentor and mentee, PLUS worked on two additional tools: a message board and a task list. The message board aims at simplifying the documentation of the progress for the mentee in collaboration with the mentor, who can easily make comments. The task list allows to easily manage next steps and allows the mentee to define tasks based on priority. Both tools could not be evaluated and were not integrated yet and it needs to be investigated to what extent these tools could support the collaboration between mentor and mentee. In Figure 19 and Figure 20 the

sketches of the two tools (message board and to-do-list) are illustrated. Both tools are not fully integrated yet, however are running locally.

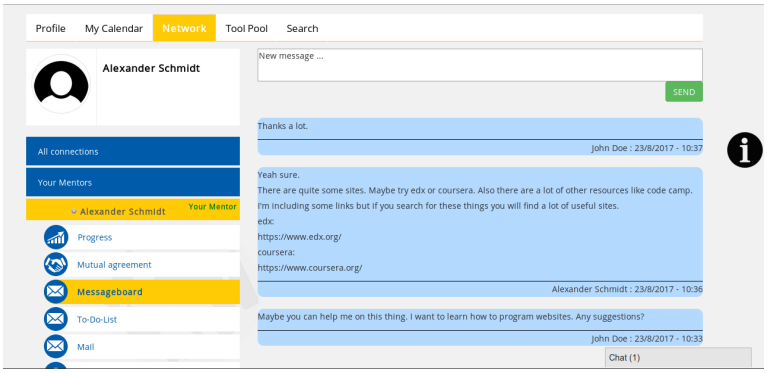

Figure 19: Sketch of the Message Board

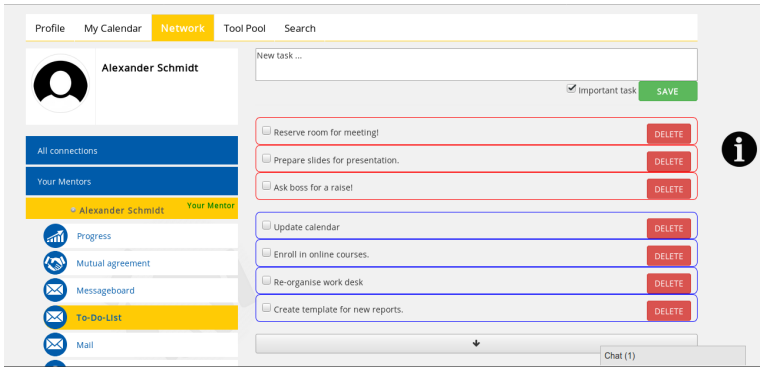

Figure 20: Sketch of the to-do-list

5.9 To what extent does the cultural background (e.g., language) influence the negotiation and collaboration process?

By means of research question six we aim at understanding if users get in contact with mentors/mentees in other countries and if the ***language*** or other ***cultural differences influence the collaboration*** between mentor and mentee. Moreover, we will investigate if participants reached common ground, i.e., had or developed a kind of shared "mind-set", which can be also considered as an important cognitive dimension. Due to the fact that the field trial could not be carried out like initially planned, we could not identify any cross-cultural collaborations.

5.10 Technical issues

The results of the field trials need to be considered with regard to some limitations. During the course of the study a variety of technical issues were identified: technical problems (bugs), two needed to be classified as both, usability and technical issue as the user did not understand the platform's behavior due to receiving an incomprehensible error message. Additionally, typos/mistranslations and an issue due to changes in a 3rd party API came up. Regarding the different sections of the platform, the network area caused one third of the problems (particularly the progress, mutual agreement and the send mail feature). Almost one third occurred dealing with notifications (receiving or responding to them). The last third can be split up into issues found in the search, profile and when requesting and/or deleting contacts. Unfortunately, also the search function was not working in the beginning, as the two databases (one at SIVECO's side and one at GLUK's) were not in sync. However, participants could search for collaboration partners using the built-in browser search and this issue could be solved by beginning of May 2017. Both technical partners, SIVECO and GLUK, provided technical support and tried to solve occurring problems as soon as possible.

6 SUMMARY AND OVERALL CONCLUSION

Summing up, the field study revealed opposing results. One the one hand, the results show that the platform supported the development of mutual beneficial intergenerational mentoring relationships, which was the major goal we aimed to achieve with the project. On the other hand, not all of the tools that had been developed were easy to use, due to technical immaturity and high error proneness. Hence, the platform could only partly support the users on the platform.

In principle, ***the network structure (RQ1) allowed the constitution of mentor/mentee pairs.*** There were slightly more mentors than mentees and expertise and interests allowed to find an appropriate match. Although it needs to be considered that participants were partly supported to find a collaboration partner, most of the participants, who were not supported, could easily find somebody they could collaborate with. The tool that supported this initial process (skills profile), was considered valuable and participants appreciated the idea that they could indicate their expertise as well as needs for advice and the ***possibility to send contact requests*** independently of the intended role. This approach did not only allow the mentees to search for an appropriate mentor, but also allowed mentors to search for a mentee. Although most of the relationships were initiated by a user, who was searching for advice in a particular field (mentee), users, who rather considered themselves as mentor appreciated the possibility to search in this way for an appropriate collaboration partner (even if it was not always easy to find a collaboration partner). One mentor, for example needed to send three contact requests until s/he found somebody who was willing to work with him.

Although a variety of technical problems occurred in the beginning of the field trial (e.g., lack of notifications, not working matching system, bugs) almost two thirds of the participants, who were in an approved relationship became and stayed active on the platform. All of these participants reported about positive experiences with their collaboration partner, even if they did not reach the goal they had defined in the beginning (mainly due to time constraints). In this context, it needs to be considered that some of the participants started later (in May 2017) and, hence, only had 5 to 6 weeks left until the field trial was finished. It is also important to mention that not only the mentees could benefit from the relationships but also the mentors. They, for example reported that they could gain value out of the relationship, because they shared, for example, the happiness of the mentee, or did appreciate to get to know somebody else. Hence, not the goal itself was important but also relational aspect. Hence, all of these active ***participants could manage to overcome the virtual distance (RQ2), however it seems that the platform could only partly support this process***, since the communication tools were considered poor, e.g., the chat did not provide a history, or the video-call was instable, providing a blurred image of the communication partner and participants chose alternative ways to stay in contact, e.g., Skype, WhatsApp or their personal telephone.

The ***mutual agreement tool*** was considered as a powerful and valuable tool, supporting mentor and mentee in the beginning of their collaboration. It did not only support them to clarify open issues in the beginning but was considered as a guideline that helped to structure the mentoring relationship. ***Hence, the mutual agreement supported participants in defining the framing conditions of their collaborative relationship (RQ3).*** This tool, was used by the majority of participants, who actively collaborated with each other. Although, this tool was

developed to support participants throughout the overall collaboration, we found out that all participants, who stayed active, used the tool only in the beginning of their relationship.

The overall collaboration could only be partly supported by the platform (RQ5). Participants liked the idea of the calendar, however, stated that it would be only beneficial if they could sync it with their personal calendar. Moreover, the notifications were not considered useful. In the beginning, due to configuration issues, there weren't any notifications sent and afterwards, users received empty notifications or mails that contained several times the same content (hence were not considered meaningful and were wondering if this was a bug). All of these issues had been raised several times, however the technical partner, who was responsible for the GUI design and development, was not able to solve this issues in time.

Due to the problems with the matching system, there weren't any cross-cultural relationships, hence ***RQ6 could not be answered at all.***

Based on this data social capital in terms of intellectual capital is partly supported by the platform. The constitution of the social network was good as a basis to form mentoring relationships, however, in terms of the relational dimension, only the mutual agreement supported participants to define the framing conditions. However, this is only one factor among others. Finally, the cognitive dimension could not be investigated since participants did not need to overcome cultural differences, e.g., in terms of language barriers.

Summing up the results, we can conclude that the ***platform could partly supported the development of mutual beneficial intergenerational mentoring relationships***. Particularly the tools for collaboration (calendar, progress, etc.) would need to be further developed and with regard to the tools for communication there is still space for improvement. To provide an added value to the participants, video-communication as well as chat would need to be further developed and the overall collaboration process would need to be supported by, e.g., meaningful notifications. Although, the results clearly show that the platform needs to be further developed provide added value to its users, it is important to consider that participants, who stayed active, gained value out of the collaboration, hence the platform could at least contribute to the development of intellectual capital.

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7 ANNEX A - STUDY MATERIALS

7.1 Information Sheet

Professional Intergenerational Cooperation and Mentoring
ProMe

Informationsblatt zur Pilotstudie zu
*** Online-Mentoring ***

DIE PILOTSTUDIE

Im Rahmen des EU-Projekts ProMe wurde in den letzten drei Jahren eine Mentoring-Plattform entwickelt, die Wissensaustausch über Generationen hinweg fördert. Nun haben Sie die Möglichkeit, die unterschiedlichen Funktionalitäten der Plattform im Rahmen einer Pilotstudie zu nutzen. Diese ermöglicht es Ihnen, mit Leuten in Kontakt zu kommen, die Sie in beruflicher oder privater Hinsicht unterstützen können (MentorInnen), oder die Unterstützung in einem bestimmten Bereich suchen (Mentees). Dabei werden verschiedene Werkzeuge auf der Plattform bereitgestellt, die Sie in der Kommunikation und Zusammenarbeit mit Ihrem/Ihrer MentorIn/Mentee unterstützen. Die Pilotstudie findet von **27. März 2017 bis 31. Mai 2017** statt. In dieser Zeit können Sie die Plattform kostenfrei nutzen.

Um nähere Informationen zu Ihren Erfahrungen im Umgang mit der Plattform zu erhalten bitten wir Sie während der Studie um Feedback in Form eines kurzen Telefoninterviews. Nach der Studie erhalten Sie einen Online Fragebogen und wir würden uns freuen wenn Sie an einem Abschlussinterview teilnehmen. Ihre Rückmeldungen helfen, uns die Plattform zu einem marktreifen Produkt weiterzuentwickeln.

DAS PROJEKT

Das Projekt ProMe (Professional, Intergenerational Cooperation and Mentoring) zielt darauf ab, älteren Erwachsenen eine Möglichkeit zu bieten, ihr berufliches Wissen über eine Online Plattform weiterzugeben und erlaubt somit jüngeren Generationen, von diesem Erfahrungsschatz zu profitieren. Die Plattform wurde im Rahmen eines EU-Projekts entwickelt. Nähere Informationen zum Projekt finden Sie auf unserer Homepage unter pro-me.eu.

INFORMATIONEN ZUR DATENVERWERTUNG

Die Daten die während der Studie gesammelt werden (mittels Fragebögen, Interviews, etc.) dienen **ausschließlich** Analysezwecken und werden nur für die Vorbereitung von entsprechenden Untersuchungsergebnissen verwendet. Das **anonymisierte** Rohmaterial kann für Präsentationen und wissenschaftliche Publikationen im Rahmen der Studie verwendet werden. Es wird aber **nicht an Dritte weitergegeben**.

WICHTIGE AKTIVITÄTEN UND TERMINE:

1. **Registrierung:**
   Bitte registrieren Sie sich **ab 20. März bis spätestens 31. März 2017** über folgenden Link auf der ProMe Plattform: platform.pro-me.eu/de (Bitte beachten Sie, dass eine Registrierung auf der Plattform vor 20.März **NICHT** möglich ist!)

2. **Ein Profil erstellen:**
   Bitte erstellen bis spätestens zum **31. März 2017** Ihr Profil auf der Plattform (das Profil beinhaltet wichtige Informationen um eine/n passenden MentorIn/Mentee zu finden!).

3. **Eine/n passende/n MentorIn/Mentee finden:**
   Bitte suchen Sie bis spätestens **31. März 2017** nach einem/einer passenden MentorIn/Mentee über die Plattform.

4. **Zusammenarbeit mit Ihrem/Ihrer MentorIn/Mentee:**
   Bitte füllen Sie zu Beginn der Zusammenarbeit die *Gegenseitige Vereinbarung* aus (spätestens bis zum **7. April 2017).**

Die Plattform ist bis **Ende Juni 2017** verfügbar. Wenn Sie die Plattform darüber hinaus nutzen wollen, kontaktieren Sie bitte Eva Reithner (eurag@eurag.at) oder Katja Neureiter (katja.neureiter@sbg.ac.at).

Wir freuen uns über Ihre Teilnahme!

Kontaktinformation

Katja Neureiter
Postdoctoral Research Fellow

Center for Human-Computer Interaction
University of Salzburg

Jakob-Haringer-Straße 8/Techno 5
5020 Salzburg, Austria
Phone: 0662 8044 4800
Email: katja.neureiter@sbg.ac.at
http://hci.sbg.ac.at/neureiter

7.2 Informed Consent

Professional Intergenerational Cooperation and Mentoring ProMe

LOGO Partner

Informed Consent Form

Dear participant,

this study is conducted by the Center for Human-Computer Interaction (Department of Computer Sciences) of the University of Salzburg, in cooperation with project partner name/organization. It takes place within the scope of the ProMe project, which focuses on the development of a platform that enables older adults to share their professional knowledge.

All the material collected during the study is going to be used for analysis purposes of the ProMe project and for scientific publications. All materials will only be used anonymously and the raw data will not be passed on towards third parties outside the project.

With your signature you give the irrevocable permission that all data collected within this study can be used for the purposes mentioned above and that you cannot assert any claim against the University of Salzburg and their members out of it, or any institutions that are involved in the project.

Furthermore, you confirm that you have been informed sufficiently about the project, that your questions have been answered to your full satisfaction and that you had the possibility to resign participation at any time.

Place and Date: _____

Name (in capitals): _____

Signature: _____

7.3 Questionnaires

7.3.1 Feedback Questionnaire Online

With regard to the field studies, we intend to assess participant's experienced usefulness of provided tools (e.g., the MA tool) to reach personal targets. We further aim at understanding the quality of the mentoring process (e.g., how often mentoring pairs got in contact with each other, which communication tools they used). In order to further determine in which ways provided tools support the mentoring process as well as to identify possible interactions with participant's overall evaluation of usefulness we gather data concerning the mentoring relationship.

Based on our research, we found that available evaluation tools are in many cases shaped for specific mentoring programs. For instance, the Munich-Evaluation-of-Mentoring-Questionnaire (MEMeQ) to assess mentees satisfaction concerning their mentoring relationship in a medical education setting (Schäfer et al., 2015), or the Mentorship Profile Questionnaire and Mentorship Effectiveness Scale developed by a Faculty Mentoring Committee around Ronald A. Berk (2005), also in terms of academic medical education. In order to evaluate the mentoring processes, the relationship between mentor and mentee as well as the outcome, we therefore, had to extract and re-shaped the for our purpose relevant questions out of current tools/method. Furthermore, the questionnaire is also oriented on the works of Nahapiet & Ghoshal (1998) and Clutterbuck (2012).

A) DEMOGRAPHIC DATA

1. Which role did you take on the platform? *(multiple responses possible)*
   - *I have been active as a mentor*
   - *I have been active as a mentee*
   - *I have been active as an advisor (in the Q&A forum)*
2. Do you have prior experience in mentoring/coaching? *(yes/no)*
3. Do you have experience with using ONLINE tools for professional collaboration (videoconferencing, chat, etc. for example via Skype)? *(yes/no)*
4. Did your ProMe mentor/mentee live in your near vicinity? *(yes/no)*
5. Did you ever meet your ProMe mentor/mentee face-to-face? *(yes/no)*
6. Did you conduct the mentoring activities in your mother tongue*? (yes/no)*

   If no:

   Did you experience the language differences as a hurdle for a successful mentoring relationship? *(yes/no)*

B) MENTORING PROCESS

The 'matching' process

7. Could you easily find a match via the platform *(yes/no)?*
8. How long did it take until you found an appropriate mentor/mentee *(single responses)*
   - *… hours*
   - *… days*
9. Did you get sufficient information about the potential mentor/mentee via the profile/CV before you decided whom you would like to contact? *(yes/no)*
10. How did you get in contact with your mentor/mentee for the first time? *(single responses)*
    - *Email*
    - *Chat*
    - *Audio call*
    - *Video call*

Start of the relationship

11. Did you discuss mutual expectations with your mentor/mentee in the beginning of the mentoring/coaching process? *(yes/no)*
12. Did you set clear mentoring/coaching goals with your mentor/mentee in the beginning of the relationship? *(yes/no)*
13. Did you make use of the mutual agreement tool? *(yes/no)*

    If yes:

    13.1. For what purpose did you use the mutual agreement tool?
    - *I used the tool only in the beginning of the relationship to set the framing conditions of the collaborative relationship.*
    - *I continuously updated the mutual agreement together with my mentor/mentee during the collaborative relationship.*

    13.2. To what extent did you consider the trigger questions useful to discuss the mutual expectations? *(useful, rather useful, rather not useful, not useful)*

    13.3. Please indicate to what extent you agree to the following statements *(agree, rather agree, rather disagree, disagree):*
    - *We (mentor and mentee) really used it as a collaborative tool that allowed to mutually discuss our expectations, and develop a shared understanding of what our 'collaboration and mentoring' needed to be.*
    - *We (mentor and mentee) used the tool 'unilaterally' to indicate our expectations but did not have a real dialogue about expectations, needs etc..*
    - *We could create one shared 'vision' on how we wanted to work together.*
    - *I experienced closeness and connectedness when communicating with the mentor/mentee via the platform.*

    If no:

    13.4. Was there a particular reason for not using the mutual agreement tool? *(yes/no)*

    13.5. Please shortly describe the reason. *(open answer)*

Process

14. How regularly did you get in contact with your mentor/mentee? *(single response)*
    - *We planned ahead regular meetings (e.g., once a week, twice a week).*
    - *We planned the 'next contact' at the end of each previous contact (one at the time).*
    - *We did not plan our contacts, but only contacted each other sporadically/spontaneously when questions or need arouse.*
15. How satisfied are you with the frequency of meetings? *(satisfied, rather satisfied, rather not satisfied, not satisfied)*

16. How did you usually (most of the time used) get in contact with each other? *(multiple responses possible)*
    - *Email*
    - *Chat*
    - *Telephone conference*
    - *Video conference*
17. Do you have any preferences regarding the mentoring tools?
    If yes:
    17.1. Which of the tools did you like best?
    - *Email*
    - *Chat*
    - *Audio Call*
    - *Video Call*
    - *Please shortly describe why you preferred the tool.*
18. Did you experience a kind of connectedness when you were in contact with your mentor/mentee via the platform? *(yes/no)*
19. Are there additional features would you have liked (other tools, further functionalities of existing tools)? *(yes/no)*
    If yes:
    19.1. Please provide an example. *(open answer)*

Quality of the relationship

20. Overall, how satisfied are you with your mentoring relationship? *(satisfied, rather satisfied, rather not satisfied, not satisfied)*
21. Did you provide feedback to your mentor/mentee about how you felt it was going? *(yes/no)*
    If yes:
    21.1. Did that feedback result in 'amended' ways of working and improved mentoring quality? *(yes/no)*

C) USEFULNESS

22. Overall, how useful was the platform in achieving your mentoring goals? *(very useful, rather useful, not very useful, not useful)*
23. How useful did you consider the calendar tool to coordinate appointments with your mentor/mentee? *(useful, rather useful, rather not useful, not useful, I cannot tell)*
24. How useful did you consider the mutual agreement tool to support you in defining the framing conditions of the collaborative relationship? *(useful, rather useful, rather not useful, not useful, I cannot tell)*
25. How useful did you consider the progress tool useful for supporting your purposes/goals? *(useful, rather useful, rather not useful, not useful, I cannot tell)*
26. Did you make use of any materials from the tool pool? *(yes/no)*
    If yes:
    26.1. Please indicate which of the following tools you used *(multiple response possible)*
    - *G.R.O.W.*
    - *Constructive Feedback*
    - *Active Listening*
    - *Develop Your Strengths*
    - *Mentoring Basics for Mentees*
    - *Mentoring Basics for Mentors*
    - *Review Tool (Mentee)*
    - *Review Tool (Mentor)*

D) OUTCOME

Outcome of the mentoring process

27. How satisfied are you with the outcome of the mentoring/coaching process? *(very satisfied, rather satisfied, rather not satisfied, not satisfied)*
28. Would you be willing to continue the relationship with this mentor/mentee? *(yes/no)*
29. If in the future you would engage in a different 'mentoring process' with another mentee/mentor, would you consider using ProMe again? *(yes/no)*
    If no:
    29.1. Please shortly describe the reason. *(open answer)*
    If yes:
    29.2. Please shortly describe the reason. *(open answer)*

30. Have you met the goals you had set for the mentoring process? *(yes/no/did not set any specific goals)*

E) If you have any additional comments, please name them here. *(open answer)*

8 ANNEX B – PRE-TEST AND INTERNAL TEST ROUNDS

8.1 Task lists

8.1.1 Tasks for the mentee

1 Registration and log in	
T1.1 Information about the platform	Please go to http://platform.pro-me.eu (English) http://platform.pro-me.eu/de (German) http://platform.pro-me.eu/ro (Romanian) http://platform.pro-me.eu/nl (Dutch) You are interested in mentoring and would like to get active on the platform. Please look up detailed information about the platform. Afterwards return to the start page, where you can log in.
T1.2 Information about the various roles	You are not sure how you could get active on the platform. • Look up some information about the “roles” you could take over on the platform. • What does it mean to be a mentee?
T1.3 Register	Please register on the platform. Choose whether you like to do it using a social login (via Facebook, Google or LinkedIn) or you want to register with username and password.
Task 2 Set up a profile	
T2.1 Upload your profile picture	In order to get started, you need to set up your personal profile. This allows other

	users to easily connect with you. • Please upload a profile picture • Crop it accordingly.
T2.2 Magnify the font	While you are setting up your profile you recognize that the font could be a bit bigger. Use the possibility to enlarge the font until a value is reached that you like.
T2.3 Change your password (in case you registered with a username and a password)	You would like to increase the security of your ProMe user account. Change your password and use characters, numbers and special characters.
T2.4 Upload your CV	Although you are currently searching for advice you would like to provide information about your professional expertise and decide to set up a short CV. • Please upload your CV on the platform. • Please check, if the information has been uploaded correctly • Return to the profile area.
T2.5 Set availability	In order to make it easier for users to find an adequate collaboration partner, the system allows you to indicate your availability. You are regularly available on Mondays (in the morning from 9.00 – 12.00) and in the evening (from 20.00 – 22.00). • Please indicate your availability accordingly.
T2.6 Edit availability	You decide to change your availability. • Please delete the entry “Monday, 20.00 – 22.00” • Indicate that you are available on Tuesday 21.00 – 24.00.
T2.7 indicate your expertise/need for advice	In the profile area, you can indicate on the one hand your expertise (i.e., in which area you could provide support for others) and in which area you are searching for advice (i.e., need for a mentor, who could support you). • Please indicate that you are searching for advice in “time management”. • Add as an expertise “teacher in Spanish and French“.
T2.8 Add languages	Finally, I would ask you to indicate your language skills.

	• Your first language is German • You are fluently speaking Spanish and French.
Task 3 Search	
T3.1 Search for a mentor	You want to improve your time management and search for support in this field. Search for a mentor who has expertise in time management, is between 50 and 75 years old and is usually available on weekends.
T3.2 Add a member as a mentor	You have found a mentor, who could support you in the field of time management. You decide to send him/her a contact request.
Task 4 Calendar	
T4.1 Add a calendar entry	You would like to have a videoconference with your collaboration partner. The calendar allows you to send a meeting request to your mentor. • Please set up an appointment for the 26 February 2017 from 20.00 to 21.00. • Check the status of the meeting in your calendar
T4.2 Check calendar entry	It is a while ago, since you have sent your meeting request. • Please go to the calendar and check, if your mentor has accepted your meeting request. • Did the system notify you that the meeting request has been accepted?
T4.3 Search for a calendar entry	You do not remember anymore the time when the teleconference with your mentor will take place. Please look up the appointment in the calendar, using the search function. You noticed that this appointment is not possible for you anymore. • Please cancel the appointment with your mentor. • Are there any new appointment requests for you, too? Check this by means of the notifications and accept them as they are occurring, but do not hesitate to say “no” if they do not match your schedule.
T4.4 Cancel an appointment	Something has come up and you need to cancel the meeting with your mentor you have just accepted. • Please cancel the meeting

	• Check the status in the calendar.
Task 5 Tool Pool	
T5.1 Have a look at the materials	You do not have any experiences in the field of mentoring. The ProMe platform provides a variety of materials. • Please look up some information about being a mentee • Download the document.
Task 6 Network	
T6.1 Get an overview of the dates	You do not remember anymore your next appointment with your mentor. • Please look up the overview of the appointments with your mentor • Delete the appointments from the list, which are not relevant anymore • Is it clear for you why you can only delete one appointment from the list?
T6.2 Fill in the MA	In order to successfully work together with your mentor, it is important that you talk about your mutual expectations. Please fill in the first three fields of the MA. 1) Your motivation, why you aim at asking for mentoring is to “improve your time management”. 2) The change you expect is “better performance at work” 3) It is most important for your work with your mentor that regular meetings (once a week) take place and that your mentor provides honest feedback.
T6.3 Discuss MAs	• Please call your mentor to discuss your expectations and to define some MAs. • Please note the MAs in the shared form field and afterwards end the call.
Task 7 Progress	
T7.1 Create a new topic in the progress	You have agreed that you will start with an “analysis of your daily routine”. The last week you have worked on this analysis and have identified two major sub-topics you have started working on 1) “activities that require a lot of time“ (“reading and writing e-mails“) and 2) “activities for which you would need more time“ (“improving team work“).

	• Please document these considerations / achievements in your progress.
T7.2 Close a subtopic	You are satisfied with your progress and do not need any feedback from your mentor anymore. • Close the topic.
T7.3 Start a chat	You would like to have a brief chat with you collaboration partner. • Please contact your mentor via chat, asking her / him if s/he has time for a short telephone conference.
Task 8 General	
T8.1 Switch the language	A friend of yours is English and you would like to show him / her the platform. • Please set the platform language to English.
T8.2 Respond to notifications	You notice that there are new notifications. Respond to at least two notifications • Mark them as read • Delete them
T8.3 Questions and answers	You run into a problem and cannot find help to solve it. • Please ask a question that was not answered by the platform (Tool Pool or other information) yet
T8.3 Sign out	You've done what you wanted to do in your session. • Sign out for today.

8.1.2 Tasks for the mentor

1 Registration and log in	
T1.1 Information about the platform	Please go to http://platform.pro-me.eu (English) http://platform.pro-me.eu/de (German)

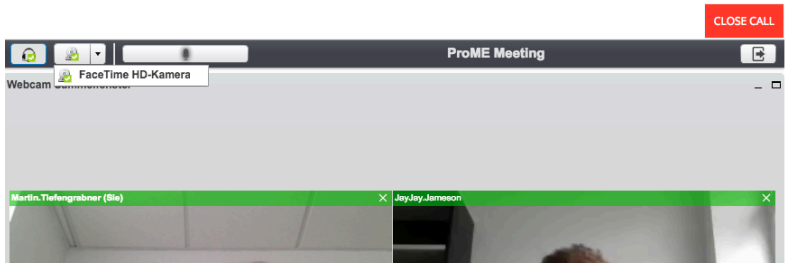
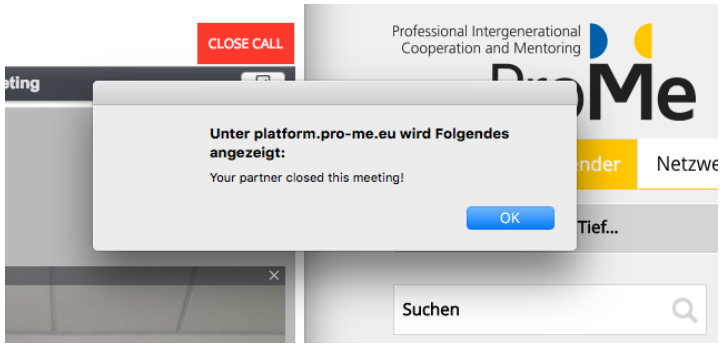
	http://platform.pro-me.eu/ro (Romanian) http://platform.pro-me.eu/nl (Dutch) You are interested in mentoring and would like to get active on the platform. Please look up detailed information about the platform. Afterwards return to the start page, where you can log in.
T1.2 Information about the various roles	You are not sure how you could get active on the platform. • Look up some information about the “roles” you could take over on the platform. • What does it mean to be a mentee?
T1.3 Register	Please register on the platform. Choose whether you like to do it using a social login (via Facebook, Google or LinkedIn) or you want to register with username and password.
Task 2 Set up a profile	
T2.1 Upload your profile picture	In order to get started, you need to set up your personal profile. This allows other users to easily connect with you. • Please upload a profile picture • Crop it accordingly.
T2.2 Magnify the font	While you are setting up your profile you recognize that the font could be a bit bigger. Use the possibility to enlarge the font until a value is reached that you like.
T2.3 Change your password (in case you registered with a username and a password)	You would like to increase the security of your ProMe user account. Change your password and use characters, numbers and special characters.
T2.4 Upload your CV	Although you are currently searching for advice you would like to provide information about your professional expertise and decide to set up a short CV. • Please upload your CV on the platform. • Please check, if the information has been uploaded correctly

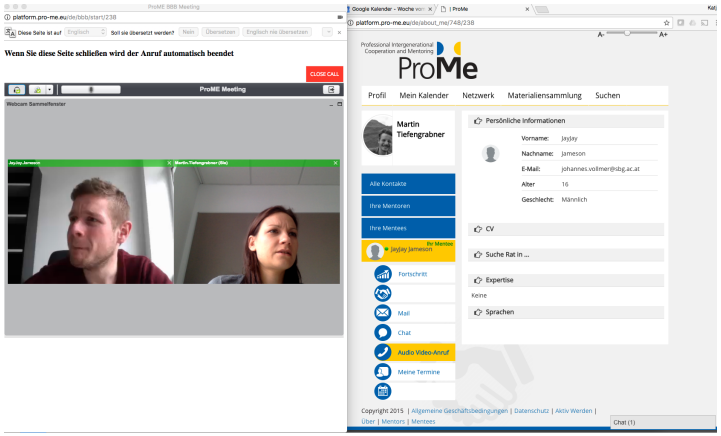
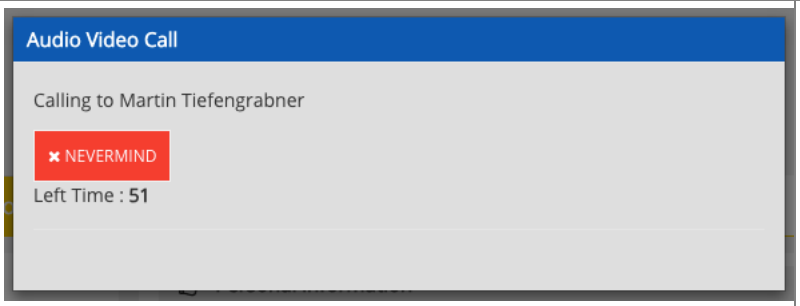
	• Return to the profile area.
T2.5 Set availability	In order to make it easier for users to find an adequate collaboration partner, the system allows you to indicate your availability. You are regularly available on Mondays (in the morning from 9.00 – 12.00) and in the evening (from 20.00 – 22.00). • Please indicate your availability accordingly.
T2.6 Edit availability	You decide to change your availability. • Please delete the entry “Monday, 20.00 – 22.00” • Indicate that you are available on Tuesday 21.00 – 24.00.
T2.7 indicate your expertise/need for advice	In the profile area you can indicate on the one hand your expertise (i.e., in which area you could provide support for others) and in which area you are searching for advice (i.e., need for a mentor, who could support you). • Please indicate that you are searching for advice in “time management”. • Add as an expertise “teacher in Spanish and French“.
T2.8 Add languages	Finally, I would ask you to indicate your language skills. • Your first language is German • You are fluently speaking Spanish and French.
Task 3 Search	
T3.1 Search for a mentee	You do not want to wait for the contact request from a mentee but to take things into your own hands. Search for a mentee who has a need in time management, is between 20 and 30 years old and has flexible availability.
T3.2 Add a member as a mentee	Finally, you have received a contact request from a mentee, who needs support in the area of time management. Since you have great experience in this field you decide to accept the contact request.
Task 4 Calendar	
T4.1 Add a calendar entry	You would like to have a videoconference with your collaboration partner. The calendar allows you to send a meeting request to your mentor. • Please set up an appointment for the 26 February 2017 from 20.00 to 21.00. • Check the status of the meeting in your calendar

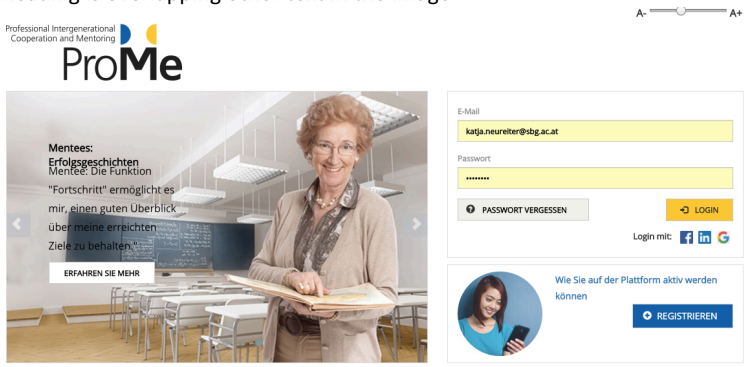
T4.2 Check calendar entry	It is a while ago, since you have sent your meeting request. • Please go to the calendar and check, if your mentor has accepted your meeting request. • Did the system notify you that the meeting request has been accepted?
T4.3 Search for a calendar entry	You do not remember anymore the time when the teleconference with your mentor will take place. Please look up the appointment in the calendar, using the search function. You noticed that this appointment is not possible for you anymore. • Please cancel the appointment with your mentor. • Are there any new appointment requests for you, too? Check this by means of the notifications and accept them as they are occurring, but do not hesitate to say “no” if they do not match your schedule.
T4.4 Cancel an appointment	Something has come up and you need to cancel the meeting with your mentor you have just accepted. • Please cancel the meeting • Check the status in the calendar.
Task 5 Tool Pool	
T5.1 Have a look at the materials	You do not have any experiences in the field of mentoring. The ProMe platform provides a variety of materials. • Please look up some information about being a mentee • Download the document.
Task 6 Network	
T6.1 Get an overview of the dates	You do not remember anymore your next appointment with your mentor. • Please look up the overview of the appointments with your mentor • Delete the appointments from the list, which are not relevant anymore • Is it clear for you why you can only delete one appointment from the list?
T6.2 Fill in the MA	In order to successfully work together with your mentee it is important that you talk about your mutual expectations. Please fill in the first three fields of the MA.

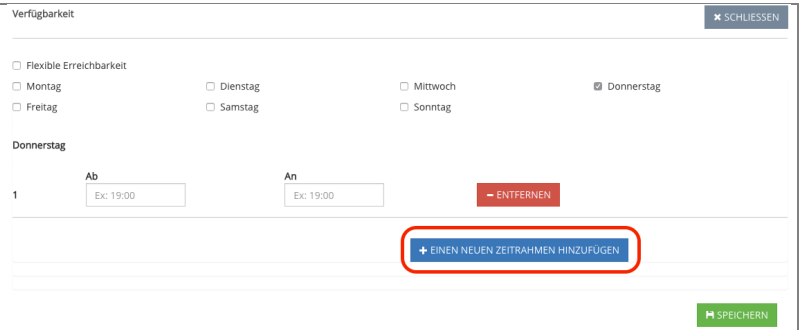
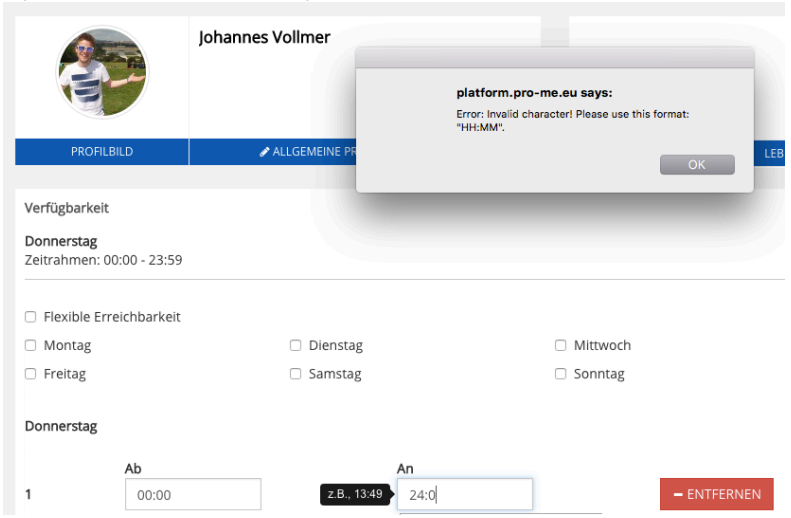
	1) Your professional context, with which you can support the mentee is experience in the field of time management 2) You aim at encouraging the mentee to identify his / her own potential to improve his/her time management 3) You expect that you regularly meet via video call to discuss the progress.
T6.3 Discuss MAs	• Please call your mentee to discuss your expectations and to define some MAs. • Please note the MAs in the shared form field and afterwards end the call.
Task 7 Progress	
T7.1 Comment on the progress	Your mentee has made a new entry in the “my progress tool”. S/he has created two subtopics. • Please add a comment to one of the topics, saying that you appreciate the effort s/he has put in these activities.
T7.2 Start a chat	You would like to have a brief chat with you collaboration partner. • Please contact your mentor via chat, asking her / him if s/he has time for a short telephone conference.
Task 8 General	
T8.1 Switch the language	A friend of yours is English and you would like to show him / her the platform. • Please set the platform language to English.
T8.2 Respond to notifications	You notice that there are new notifications. Respond to at least two notifications • Mark them as read • Delete them
T8.3 Questions and answers	You run into a problem and cannot find help to solve it. • Please ask a question that was not answered by the platform (Tool Pool or other information) yet
T8.3 Sign out	You’ve done what you wanted to do in your session. • Sign out for today.

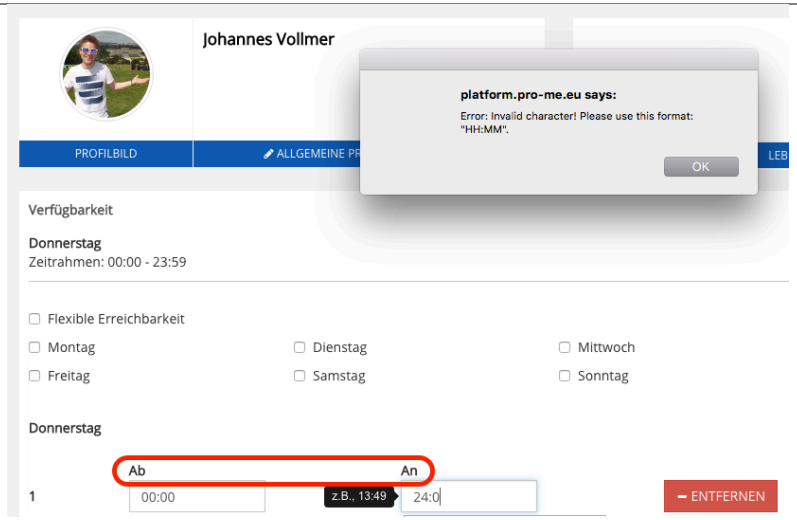
8.2 Issues reported during the internal test rounds before the start of the trial – week 11

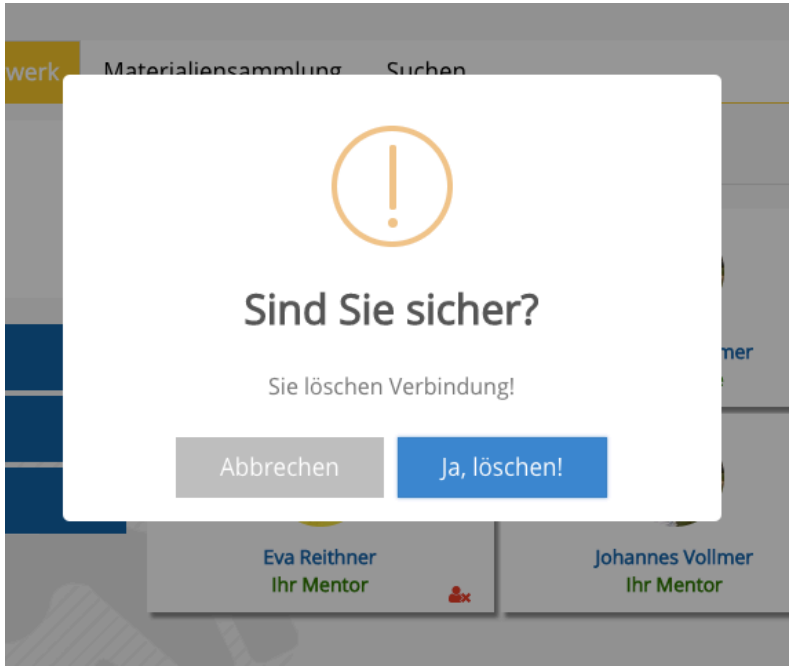
Feedback Internal Testing - week 11				
N°	**Organization**	**Area**	**Description**	**Additional Comments/Suggestion for Improvement**
1	PLUS	Calling	Sometimes no ringing at the communication partner's side (the person who needs to accept the call)	Problem could not be idenfied
2	PLUS	Calling	Close call – still in English **Wenn Sie diese Seite schließen wird der Anruf automatisch beendet** 	It should be translated – "Anruf beenden"
3	PLUS	Calling	Still the wrong feedback message „Your partner closed this meeting" 	If a user ends the all then the feedback for him-/herself should be "You have ended the call"

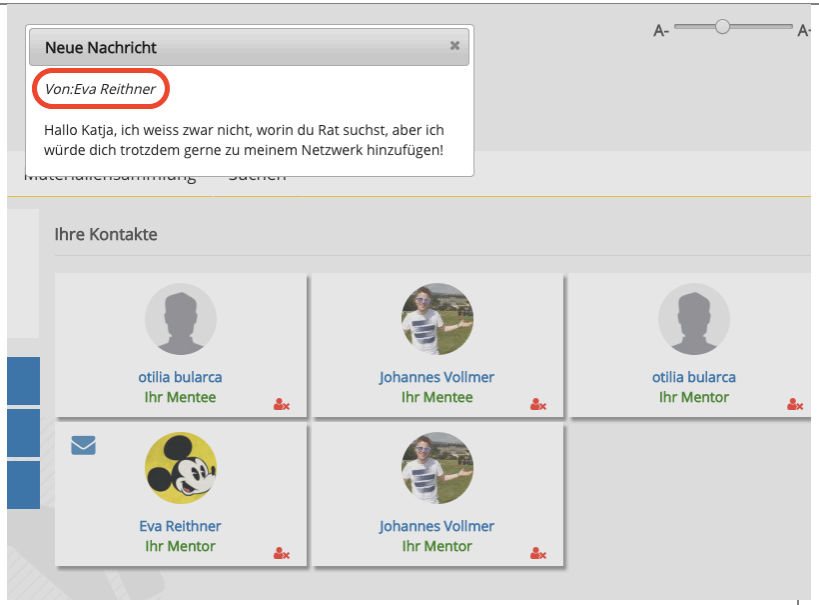
4	PLUS	Calling	Acoustic feedback/back coupling – does not occur when using head phones In Skype it works with the same set up	Could be an configuration issue in BBB
5	PLUS	Calling	When muting – the communication partner receives the message “You are currently the only person in this conference”	Issue in BBB?
6	PLUS	Calling	When resizing the tab some labels in the menu disappear (MA, calendar) 	All labels should be visible
7	PLUS	Calling		Minor issue Englisch: “Cancel“ instead of “Nevermind“ Deutsch: “Abbrechen“ instead of “Ablehnen“

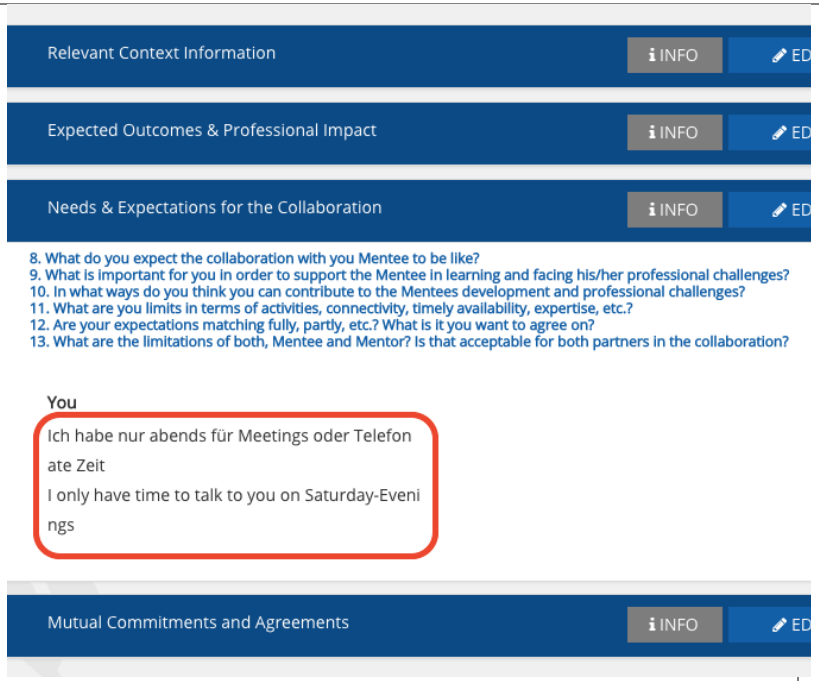
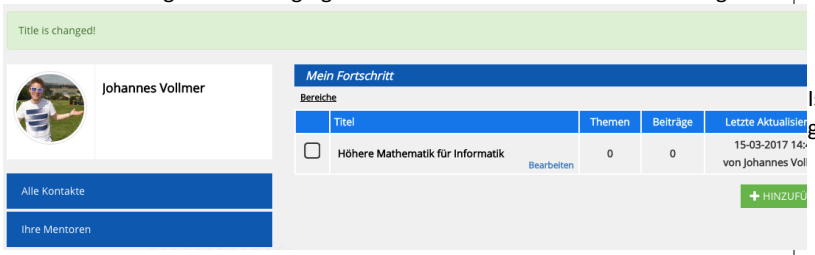
8	PLUS	Progress	Still possible that the mentor works on the progress of the mentee (sub-topic) 	Only the mentee should be able to edit topics and sub-topics in the progress The mentor should only be able to add comments
9	PLUS	Login	Heading is overlapping other text in the image 	
10	PLUS	Profile – Availability	Is there a reason for changing the add button to “add new time frame“? As we have only add for the other sections of the profile this is not consistent and also far too long in German.	Change to “add“ respectively “Hinzufügen“

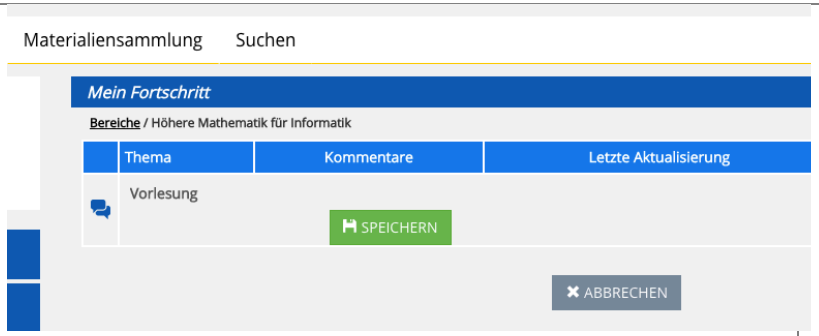
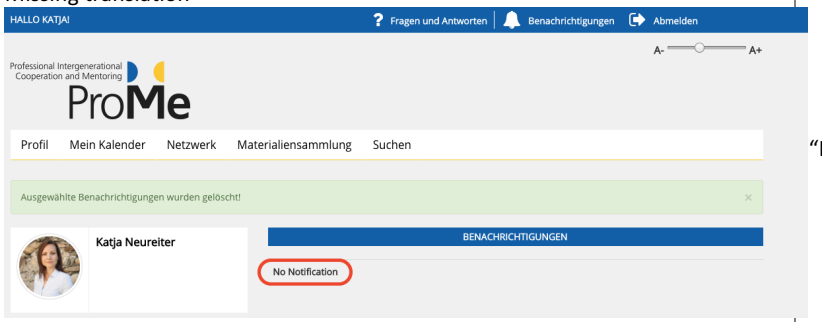
				
11	PLUS	Profile – Availability	Input of 24:00 as end time not possible. 	Should work from 00:00 until 24:00.
12	PLUS	Profile – Availability	Not sure where the translation comes from as it is not covered by the translation sheet.	“From“: “von“ instead of “Ab“ “To“: “bis“ instead of “An“

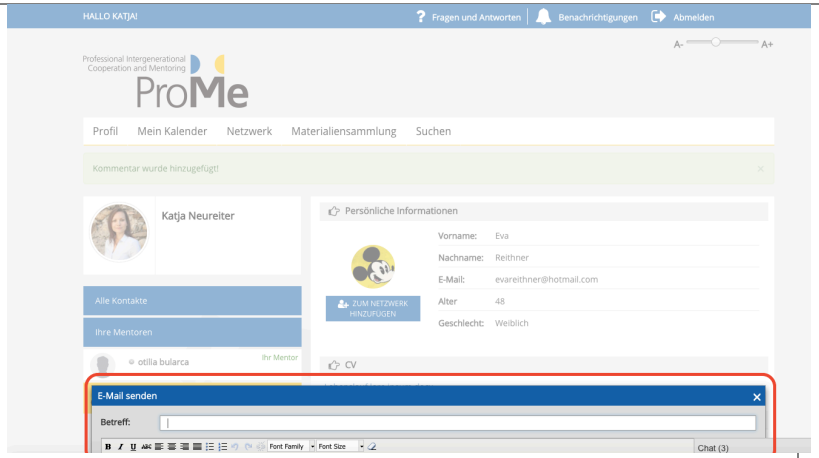
			 Johannes Vollmer platform.pro-me.eu says: Error: Invalid character! Please use this format: "HH:MM". OK PROFILBILD Verfügbarkeit Donnerstag Zeitrahmen: 00:00 - 23:59 Flexible Erreichbarkeit Montag Dienstag Mittwoch Freitag Samstag Sonntag Donnerstag Ab An 1 00:00 z.B., 13:49 24:0 ENTFERNEN	

13	PLUS	Network		"Sind Sie sicher? Hiermit löschen Sie die Verbindung und lösen damit die Zusammenarbeit auf!"
14	PLUS	Notifications	"Setzen Sie eine Gemeinsame Vereinbarung auf [Name]"	Should be: "Setzen Sie eine Gemeinsame Vereinbarung mit [Name] auf". Has also been added to the translations sheet.
15	PLUS	Network	Missing space between "from" and the sender's name in the German version.	

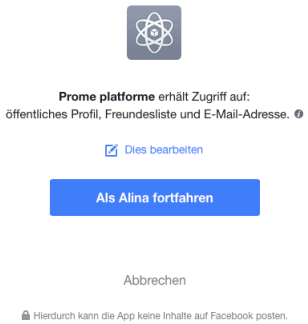
				
16	PLUS	Network – MA	Trigger Questions 12 and 13 are placed wrong	Should be moved to MAs and Commitments
17	PLUS	Network – MA	Word division not done by syllables but after any character as the word exceeds the width	Divide words by syllables

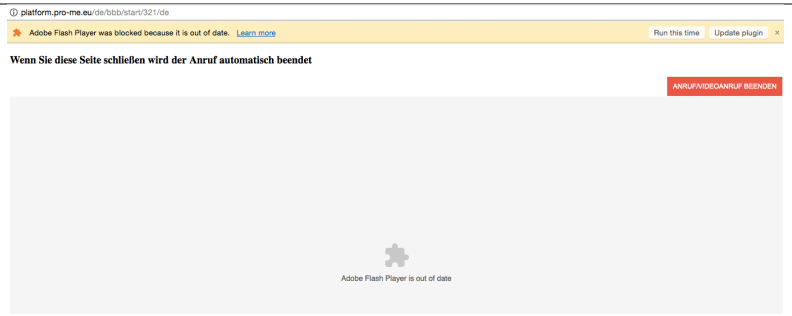
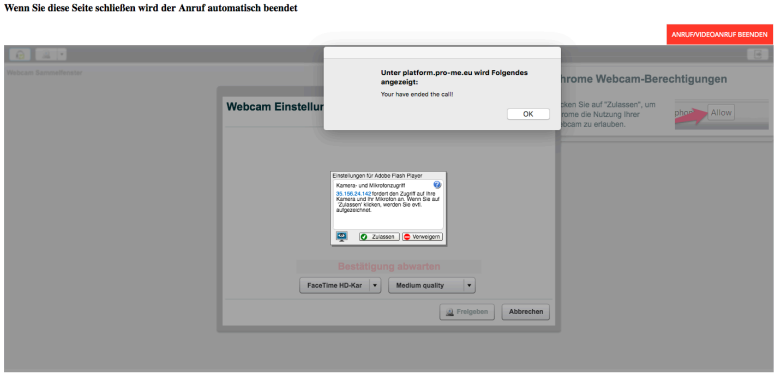
				
18	PLUS	Network – Progress	Feedback message after changing the title is not translated: “Title is changed“ 	Is already in the translations sheet: “Titel wurde geändert“
19	PLUS	Network –	Adding a topic: Save button is located in the table.	Place it outside the table.

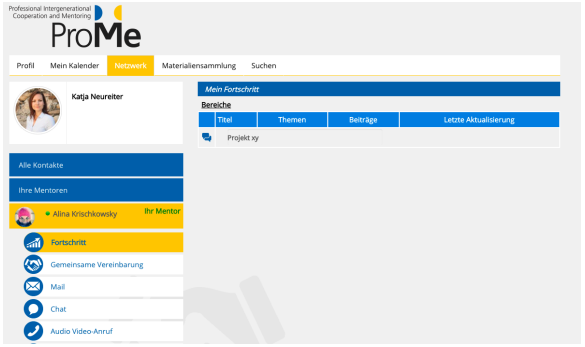
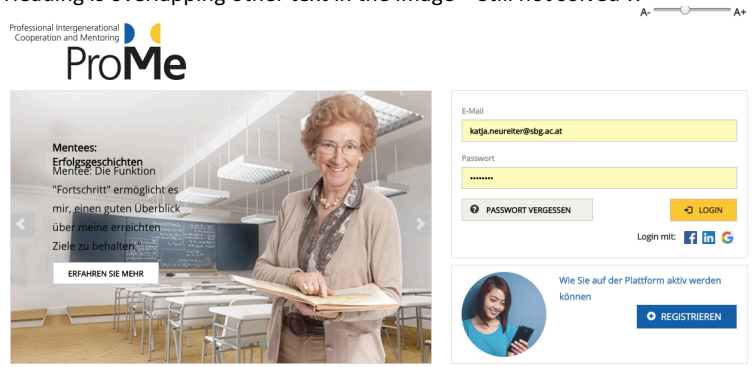
		Progress		
20	PLUS	Notifications	Missing translation 	“No Notification“: “Keine Benachrichtigungen“
21	PLUS	Network	There is a bug when trying to write an email. The text field appears in the lower area of the screen and it cannot be scrolled down --> hence there is no possibility for the user to write an email.	

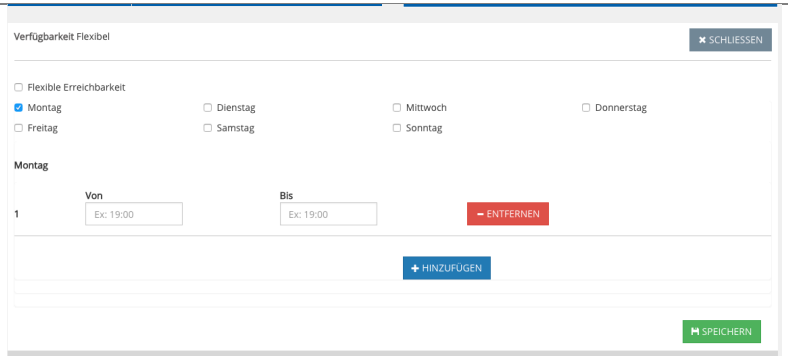
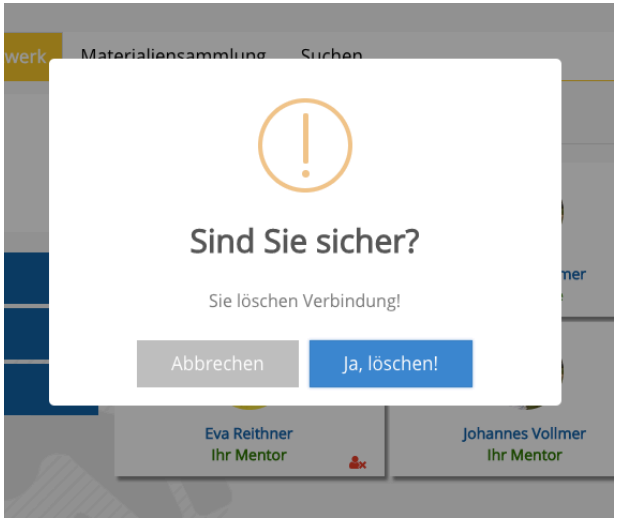
				
22	PLUS	Search	Is there a reason why the user is redirected to the Progress if s/he clicks on a name in the “My connections!“ box?“.	

8.3 Issues reported during the internal test rounds before the start of the trial – week 12

Feedback Internal Testing – week 12				
N°	**Organization**	**Area**	**Description**	**Additional Comments/Suggestion for Improvement**
1	PLUS/EURAG	Calling	Still no ringing at the communication partners side. Partner A is calling person B – it is only ringing at partner A's side	Please fix this – has been mentioned now several times! Is an issue that also occurred during the pre-test at EURAG!!
2	PLUS/EURAG	Registration	 Typo: Prome platforme → it should be **ProMe Plattform**	Please change the text: **ProMe Plattform**
3	PLUS/EURAG	Calling/install flash player	User installed flash player – nevertheless received the feedback that the flash player is out of date	Bug?

				
4	PLUS	Calling	Still the wrong feedback message „Your partner closed this meeting“ – this is now displayed for the communication partner 	If a user ends the call then the feedback for him-/herself should be “You have ended the call” For the communication partner it should also be correct: Your partner has ended the call
5	PLUS	Calling	Still acoustic feedback/back coupling – does not occur when using head phones	Could be an configuration issue in BBB

6	PLUS	Progress	No save and add buttons anymore! 	
7	PLUS	Login	Heading is overlapping other text in the image – Still not solved !! 	
8	PLUS	Profile – Availability	Add Button seems to be now randomly arranged on the platform?? Should be placed below the remove button (same in English)	Only a minor issue, however buttons shouldn' be arranged randomly …

				
9	PLUS	Network		Please change losen to **lösen**

			Typo – it is not losen but L**Ö**SEN	
10	PLUS	Notifications	“Setzen Sie eine Gemeinsame Vereinbarung auf [Name]“ **still not solved!!**	Should be: “Setzen Sie eine Gemeinsame Vereinbarung mit [Name] auf“. Has also been added to the translations sheet.