AAL
PROGRAMME

ACTIVE ADVICE
DECISION SUPPORT FOR INDEPENDENT LIVING

Decision Support Solutions for Independent Living using an Intelligent AAL Product and Service Cloud

D5.5 Training event participation and finding report
Human advisor training outline

SYNYO   zhaw   Smart Homes   Cybermoor Services LTD   YELLOW WINDOW   CINTESIS Health. Research.

Acronym:	**ActiveAdvice**
Full Title:	Decision Support Solutions for Independent Living using an Intelligent AAL Product and Service Cloud
Programme:	AAL Europe Programme
Project Number:	AAL-2015-2-058
Coordinator:	**SYNYO GmbH**
Project Duration:	04/2016 – 11/2018
Website:	project.activeadvice.eu

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Deliverable:	D5.5
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1   Introduction

The ActiveAdvice project aims to provide decision support in the process of finding the right AAL solutions, using a digital platform which offers a holistic market overview on AAL products and services, which provides comprehensive information on those products, and which brings together the different stakeholders involved in the AAL ecosystem. The project is aimed at three main stakeholder groups: consumers (older adults and their relatives and informal caregivers, AAL2C), businesses (AAL2B) and governments (AAL2G). Much-needed information on AAL solutions is provided via a comprehensive ICT-based environment, presenting a broad and state-of-the art collection on available AAL services and technologies, offered at regional, national and international level, which are stored in an Intelligent AAL Product & Service Cloud.

However, a purely online interaction might not be the best way to provide advice and decision support (for more information see Bertel et al., 2018). Therefore, the ActiveAdvice project follows an integrated logic, combining both digital and personal advice in a complementary way. The so-called 'Authorised Active Advisors' are the human addition to the digital platform.

In the following, we describe the approach for such a human addition to the digital decision-support platform, developed during the ActiveAdvice project. This is part of Task 5.4 *Provide training events for relevant user groups* to promote the ActiveAdvice environment and advisor authorization, aimed to provide insights on possible optimization of later training events, to showcase general public interest in the ActiveAdvice environment, and to support the dissemination of the innovative solutions for businesses (AAL2B).[1]

This deliverable is connected closely to all tasks and activities carried out to involve end users in the development of the ActiveAdvice framework. It makes use of the insights gathered during the requirement collection (especially *D2.2 Stakeholder and target groups report* and *D2.3 User requirements, decision workflow and use cases report*), and insights from the user tests (see *D5.3 Usability test report loop 1*, and *D5.3 Usability, feedback and survey report*).

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[1] Discussions of the Human Advisor profile started already during the requirement phase of the project. In order to outline a training concept, however, an advanced prototype was necessary. In addition, we identified a number of possibilities for these profiles, depending on context, country, or level of involvement. Therefore, we put our focus on analysing the challenges and benefits of different profiles, before starting the training outline. In order to do so, we chose interviews rather than workshops as a more suitable and time-saving methodology.

2 Methodology & Approach

The following deliverable summarises the activities carried out to create a training outline for the human advisors, i.e. the Authorised Active Advisors, based on an explorative analysis of their needs and requirements. In order to gather the necessary data, a number of activities have been carried out: (i) desk research; (ii) two workshops with a total of 11 participants; (iii) a number of 15 semi-structured interviews with 16 different stakeholders that potentially fit the human advisor profile; and (iv) a range of discussions within the consortium (detailed information on activities (ii) and (iii) can be found in the Annex). The following Figure 1 shows the logic of these activities.
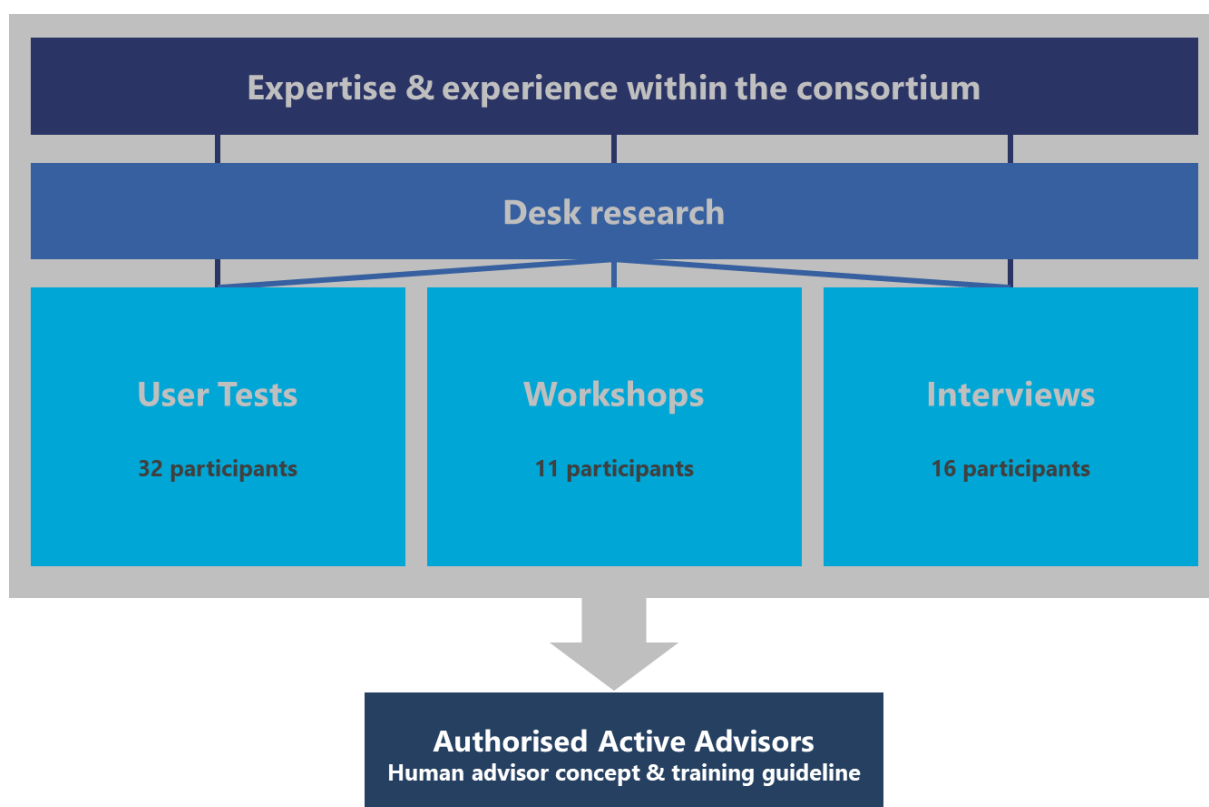

Figure 1: Approach & Methodology

All activities were aimed to answer the following questions:

- Are participants within their specific context interested in becoming human advisors?
- How do they perceive their role?
- What kind of knowledge do they need to become human advisors?
- How should that knowledge be delivered (i.e. which training concept are they looking for/would make sense for their specific case)?

All information has been analysed using qualitative content analysis and a matrix, resulting in a number of categories based on the research questions. The results of these activities are presented in the next chapters. They are neither exhaustive, nor are they representative, as an explorative approach was chosen given the nature of the knowledge we aimed to produce.

3 Profile and target groups

As the human advisors are considered one of the core concepts of the ActiveAdvice project and an important addition to the web platform, a clear definition of the intended profile that is aligned to the core values of the project and the business plan is needed. Consequently, the course content can be outlined accordingly, the possible impact and benefit of the human advisors can be specified and the community can be delineated. Besides the description of the human advisor profile, the intended target groups are characterised. All information is derived from Deliverable 2.2 (Teles, Castro & Paúl, 2017), the human advisor workshops and interviews, and internal discussions within the consortium group (as outlined above).

3.1 Human Advisor Profiles

The human advisor would primarily work in either an existing organisation or business within the ageing and care market (AAL product development, AAL advisory, sales and marketing, social care organisations, education, and governmental bodies) or have practical care / medical experience and know-how in dealing with older people (i.e. gerontologists, occupational therapists, social educators, etc.). In spite of the existing knowledge of potential human advisors from the care market, it is necessary to provide further training for these groups before they can become Authorised Active Advisors.

Overall, there are two main areas in which human advisors must demonstrate knowledge and expertise: (1) Social skills and (2) knowledge about ICT and/or AAL. It must be noted, here, that interpersonal relationship skills are considered to be more important prerequisites than technical or AAL knowledge. Each of the two areas are described in the following table.

Table 1: Skill areas for Authorised Active Advisors

Social Skills	ICT / AAL Knowledge
- Understanding of local language - Active listening - understanding the underlying needs and requirements of end-users - Conflict management - Empathy, patience and respect towards the user and his/her individual life situation, family, relatives and friends. - Willingness to engage with older adults. - Awareness on the diversity of older adults. - Communication - ability to explain issues in simple language and provide clear instructions - Respecting end-user's privacy	- Technical proficiency to navigate on the ActiveAdvice platform – e.g. find solutions using the digital advisors - Basic knowledge of AAL categories (based on TAALXONOMY) - Basic understanding of the AAL market, as well as rudimentary understanding of technological developments* - Basic understanding of technical particularities and data regarding system integrations (i.e. functions, installation, services, interoperability) - Knowledge of additional AAL resources that can be consulted - Understanding of implications of technical solutions - Experience in the usage of AAL products and potential limitations for specific groups - Knowledge about installation

	*Note that ActiveAdvice will provide a comprehensive market overview and insights into the latest technological developments.

- Ability to link correct AAL solutions to needs of the end-user.
- Willingness to learn new content.

Besides the two main areas highlighted above, human advisors should have an understanding of the topic of ageing itself and the challenges which can be connected to the ageing process, as well as the AAL sector at large. As the human advisors will also be promoting the ActiveAdvice platform, they should know what the ActiveAdvice consortium stands for, what the core values are and what the vision and mission of ActiveAdvice is.[2] Lastly, human advisors need a certain flair, social commitment and intrinsic motivation to offer advice and assist older adults in their local community.

Based on the description from the above, two main advisor profiles are compiled: Advisor profile A and advisor profile B.

Table 2: Authorised Active Advisor profiles

Advisor Profile A	
Type	E.g. AAL product developer, AAL consultant, ageing / care sales and marketing professional, …
Benefits / advantages	- ICT skills and competences - AAL market overview - Partial knowledge on technical particularities of AAL solutions - Sales / marketing expertise to offer right solution to end-user
Challenges	- Knowledge about phenomena associated with the ageing process - Experience working with older adults - Ability to approach and build up relationships with the individual end user - Particular communication skills needed for interacting with older adults
Needed knowledge	- Social and interpersonal skills - Communication psychology - Conflict management - Update on state-of-the art AAL solutions and future market development (provided by the ActiveAdvice platform) - Introduction to ActiveAdvice consortium and platform
Advisor Profile B	
Type	E.g. social worker, social educator, gerontologists, occupational therapist / professionals …
Benefits / advantages	- Experience working with older adults - Social and interpersonal skills - Knowledge about phenomena associated with the ageing process

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[2] Most importantly, this means the main objective of ActiveAdvice, namely "ActiveAdvice seeks to allow older people to live longer independently and increase their self-determination. The quality of life is improved for people who start to lose autonomy, but still want to live at home".

	• Ability to approach and build up relationships with end users
Challenges	• ICT skills and competences • Technical proficiency to navigate on the ActiveAdvice platform • AAL market overview • Knowledge on technical particularities of AAL solutions • Sales / marketing expertise to offer right solution to end users
Needed knowledge	• Understanding of AAL classification system (based on TAALXONOMY) • Preliminary overview of AAL solutions and future market developments • Basic information on technical particularities and data regarding system integrations • Basic sales and marketing skills • Introduction to ActiveAdvice consortium and platform • Practice in using digital advisor

3.2 Target Groups

The potential target group of the human advisors is diverse. In general, the following stakeholder groups have been identified and form the basis of the further delineation of the potential target groups (based on Kofler & Schmitter (2016); compare Teles et al. (2017)).

Table 3: ActiveAdvice stakeholder group characterisation

Stakeholder	Characterization
Consumer (AAL2C)	C1 Seniors investing in a new home: these are people starting 55 to 70, active seniors who decide to move to a smaller housing unit, and who wish to think ahead and adapt the house to future loss of autonomy and upcoming chronic illnesses.
	C2 Seniors who are facing loss of autonomy and wish to live longer at home. They are forced to look for solutions. The informal caregiver of this type can also be interviewed (preferably the partner, but could also be son or daughter).
	C3 Children of seniors, who wish to help and assist their elderly parent(s). This can be because of effective loss of autonomy (therefore forced to find a solution), but also to prevent further degradation (prevention).
Business (AAL2B)	B1 Suppliers of solutions (products, services or a combination)
	B2 Suppliers of solutions and services that could take a role as "active advisor"
Government (AAL2G)	G1 Suppliers of services or solutions. This can be under normal market conditions (e.g. a provision of home assistance services), or under subsidized schemes for specific target groups.
	G2 Suppliers of services assessing needs of elderly and directing them towards the right solution or service. This segment could play a role as "active advisor".

	G3 Policy makers at local, regional and national levels. Policies linked to ageing, living longer at home, health services, and homecare services.	
	G4 Public Services, senior organizations, interest groups, care cooperatives	

The main target group of human advisors are the first stakeholder group (AAL2C). According to the description above, this stakeholder group has three distinct user categories. The primary and most prominent users of AAL technologies are older adults. It is important to realise that this group is very diverse and has specific individual needs, limitations and challenges that need to be taken into consideration by the Authorised Active Advisor. Often times they are confused over technology options, they lack confidence using online channels and their readiness to accept technological solutions depend on many individual aspects such as education, age, gender, physical, mental and cognitive skills, expectations or biographical experience. The challenge is to understand their individual situation and provide the correct AAL solution.

Besides the primary target group, informal and formal caregivers play a vital role in the decision-making process. In the same way as older adults, formal and informal caregivers possess heterogeneous competencies, interests, and needs. Informal caregivers mostly provide unpaid support to older adults, performing a number of tasks, such as supporting older adults with daily activities (bathing, shopping, cleaning, etc.) and their support is often times indispensable. Statistically, informal caregivers are mainly female (see e.g. Hoffmann & Rodrigues 2010). However, the distribution tends to change according to age, with relatively more males over 75 years performing this role. The majority of caregivers recognise technological solutions that target the improvement of older adult's quality of life as useful. Nevertheless, they tend to see technologies as complementary to their role of providing care. Monitoring technology (e.g. movement detectors) are considered to be particularly valued by informal caregivers in the scope of AAL technologies. Notably, informal caregivers often times also lack ICT skills and competencies. In Austria, for example, 37.4% of all female informal caregivers are older than 65 years; with 73% of all informal caregivers being female (QSPG 2017).

Formal or professional caregivers are typically trained and qualified individuals, such as doctors, gerontologists, social workers, nurses, psychologists, educators – among others – who offer specialized services to the care receiver. Likewise, professional caregivers can benefit from AAL technologies to assist them in their daily tasks, or to support older adults to become more autonomous. Again, many of the concerns and requirements are in line with the ones of informal caregivers. Formal caregivers can either recognise technology as beneficial in supporting them, or as a concern, as they fear technology may reduce the quality of personal care (e.g. privacy loss, increased loneliness). An important aspect for their negative outlook is that professional caregivers lack proper training and guidance when new technologies are introduced into the care process. This aspect should be taken into consideration by human advisors dealing with formal caregivers.
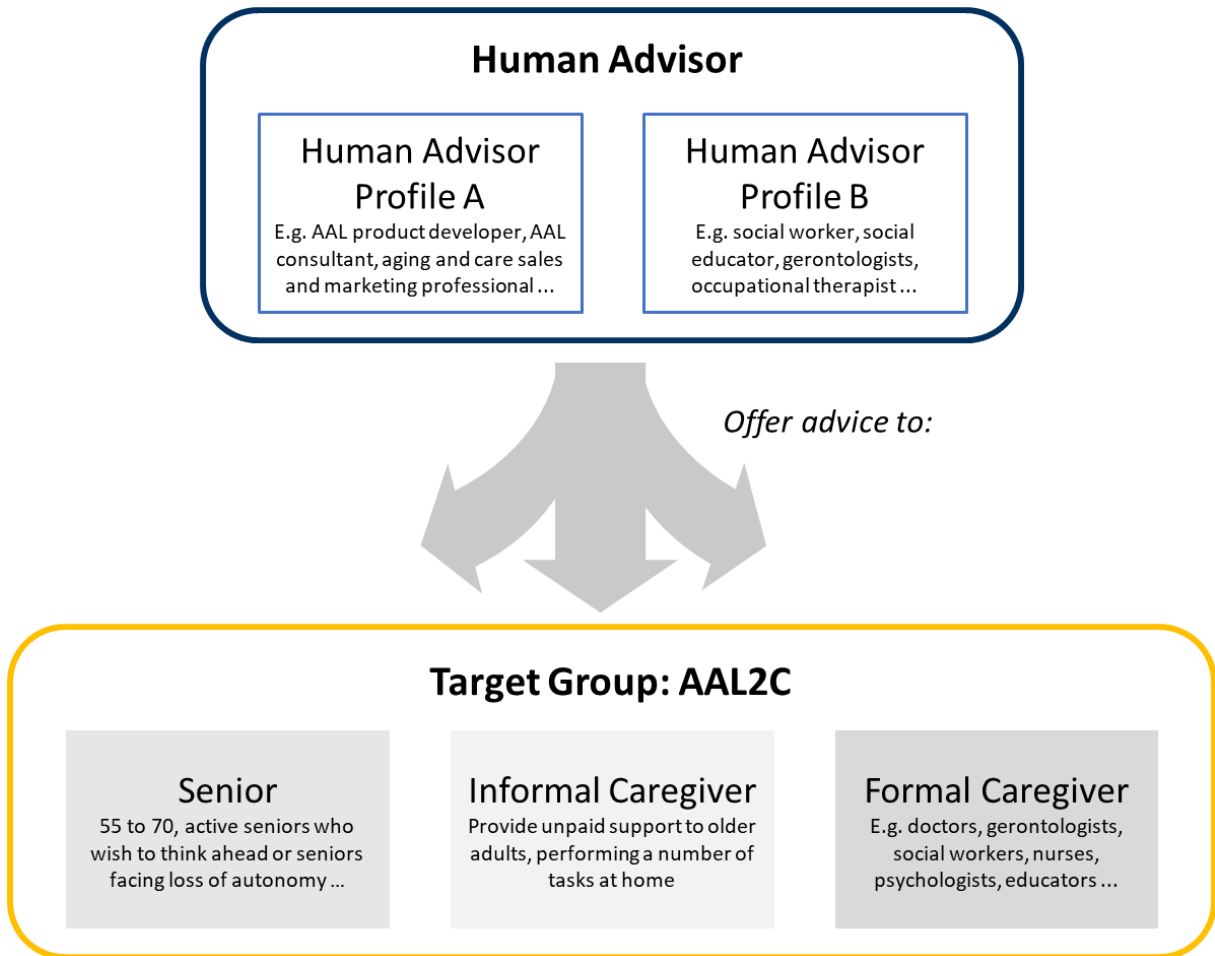
Figure 2: Human Advisor Profiles and Target Groups

Figure 2 above illustrates the (human) advice offered by the human advisors to the different target groups. As it can be seen, there is no distinction made between the human advisor profiles and the end-user target groups. Rather, the appropriate support is offered on an individual basis. There are two main human advisor profiles (see Table 2 above) can offer advice to one of the three main target groups that are either seniors, informal caregivers and formal caregivers. Because ActiveAdvice guarantees a comprehensive training concept for all human advisors, the quality of advice offered by either one of the profiles is mutual.

4 Impact and benefits of Human Advisors

The Authorised Active Advisor assists the user in using the ActiveAdvice platform as well as in the decision-making process. The role of an Authorised Active Advisor constitutes the human addition to the ICT platform as a service, which is perceived as a necessary and important complement.

Advice is considered a key service that can have a great impact and bring significant benefits to people who resort to this kind of platforms. Previous work from the ActiveAdvice project shows that end users want, for example, to learn which products or medications are good, what makes their "life easier" or where and how to find a specific product. End users normally also want to learn about the price as well as about how to order products (with clear guidelines and systematically ordering procedures). Another benefit is that ActiveAdvice helps the users to get to know detailed information before buying a product or asking for a service.

However, there are some reasons constraining end users to use or access online platforms, namely the lack of trust in online-advice. Security, trust and safety are main issues when discussing the acceptance of internet for commercial interactions. Lack of trust in ICT use and fears regarding access to personal data by others seems to prevent older adults from carrying out online transactions (Olphert et al., 2009). Furthermore, online advice could also be biased, since it might not always be transparent who is giving advice or their link to the products/services they're advising on.

In this sense, having a human advisory component could have a great impact in the way users resort to the ActiveAdvice platform (this was stated in the requirement phase of the ActiveAdvice project, as well as during the human advisor interviews). The following added values are the main impact of the Authorised Active Advisor:

- Personal contact;
- Trust;
- Context knowledge;
- Ability to fill gaps in the digital advisor system;
- Confidence;
- Decision support;
- Transparency.

In line with these core values, the ActiveAdvice technical solution - which aims at providing decision support and information -, offers the tools and information to the Authorised Active Advisors to provide end users with up-to-date, useful and applicable knowledge about AAL products and services, options for financial support and customer feedback, and the possibility to share experiences and knowledge (on the blog).

In fact, the value proposition of the Authorised Active Advisor contemplates benefits for all three target groups of the ActiveAdvice project – consumers, businesses and governments. Regarding the consumers target group, there are directs benefits associated with the role of an Authorised Active Advisor, namely in assisting older adults to access AAL content, helping them buy products and services, recommending technology that will interest them and providing comprehensive information and knowledge on AAL solutions. Older adults, as well as their relatives, have a preference to receive advice personally. This allows the advice to be personalized which constitutes a major benefit since it gives response to the users' needs. In fact, the Authorised Active Advisor will guarantee that there is a proper response to the consumer real needs, articulating those with the right product/solution and

avoiding, at the same time, an information overload that could be harmful to the advisory process. The existence of an Authorised Active Advisor will also contribute to tackle social isolation by establishing a human interaction, which consequently will have a major impact in gaining user's trust. By developing confidence among elderly in using online channels, the Authorised Active Advisors will help older adults to regain self-confidence and become more independent.

Although the Authorised Active Advisor plays primarily an advisory role towards consumers, both businesses and governments will also benefit from them. Reducing the stigmatization of AAL technologies, promoting market equipment attractively and offering differentiation over other catalogue websites (that does not contemplate a human advisor component for example) are some of the positive impacts of the Authorised Active Advisor on businesses. Regarding the benefits for governments, the existence of the Authorised Active Advisor will increase the number of people self-funding AAL solutions and, on the other hand, will reduce the number of people using council services.

In summary, the fact that an Authorised Active Advisor assists individual persons in finding the right solution for their problem or goals, have several related benefits, since:

- They listen to the needs and translate those needs into a search strategy that complements the digital advisory component;
- They identify solutions and suppliers and assess their pertinence towards each situation;
- They assist and guide the individual during the decision-making process;
- They follow-up on satisfaction and stimulate users to provide a feedback on the platform;

They can themselves feed the platform with professional feedback/testimony.

5 Course outline

The course outline will be developed centrally and be applicable to all countries where the trainings will take place. The course material will be translated into the languages the ActiveAdvice platform is currently available in (English, Portuguese, German, Dutch) with possibility of more translations in the future.

The course outline will consist of a course book for the instructors and a material and workbook for the participants. This documentation will include all material necessary for completing the Active Advice training and can be expanded on by the instructor.

5.1 Objectives

This training has the general objective of training Authorised Active Advisors who will be able to:

- Identify AAL solutions and suppliers and assess their pertinence towards users' needs, resorting to the ActiveAdvice platform;
- Translate users' needs into a search strategy;
- Assist and guide the individual during the decision-making process;
- Create, collect and/or resort to real-life testimonies, comments and ratings of products and services;
- Refer users to the correct authorities/advisors in regards to questions on reimbursement/assessment/complaints/others.

5.2 Learning outcomes and competences

At the end of this training the newly Authorised Active Advisors are expected to

- Know how to use the ActiveAdvice platform and be able to assist others in using it;
- Have general knowledge regarding the ageing process and its impacts;
- Have general knowledge regarding most frequent age-related conditions (dementia, Parkinson, Alzheimer's, etc.);
- Have a broad knowledge on AAL technologies: classification and types;
- Give advice by correlating the user needs with the different AAL products and solutions available;
- Have general marketing/sale skills;
- Have communication skills and strategies to engage users in the decision-making process;
- Have the interpersonal skills to ensure confidence and trust.

5.3 Programme Content: General knowledge and specific knowledge

The following general and specific knowledge has been specified for training future Authorised Active Advisors.

Table 4: General and specific knowledge

General Knowledge	Specific Knowledge

ActiveAdvice Project	• Introduction to the ActiveAdvice project
	  • ActiveAdvice contextualization
	  • Aims and principles
	• Introduction to ActiveAdvice platform

Ageing Process	• Physical, Cognitive and Social Impacts of Ageing
	  • Health related problems
	  • Social impacts of ageing
	• Older adults and ICT
	  • Older adults as 'Technophobics'
	  • Benefits and Challenges of ICT

Ambient Assisted Living (AAL) technologies	• AAL overview & core technologies
	  • TAALXONOMY classification model
	  • Existing AAL products and services
	• Future market developments

Reimbursement and administration	• Reimbursement policies and practices - the local reality

Communication and Human Relation	• Communicability and communication modes
	  • Customer Service Skills
	• Interpersonal relations - integral and humanized
	  • Decision-making and cooperation
	  • Active Listening & Empathy
	• ActiveAdvice code of conduct

5.4 Programme approach

The training module will be given through a series of face-to-face sessions with a small group of maximum 15 people. The teaching language of the training will be the preferred language of each region. In addition, e-learning courses will be provided.

The sessions will integrate both theoretical and practical components covering a different range of learning activities.

Programme approach: Methods & Tools

The following methods and tools have been identified to impart the necessary knowledge.

Table 5: Methods and tools

Knowledge	Methods & Tools
ActiveAdvice Project • Introduction to the ActiveAdvice project • Introduction to ActiveAdvice platform	• Exposure of contents • Course material • Online platform Active Advice • Exercises on working with the platform
Ageing Process • Physical, Cognitive and Social Impacts of Ageing • Older adults and ICT	• Exposure of contents • Course material
Ambient Assisted Living (AAL) technologies • AAL overview & core technologies • TAALXONOMY classification model • Future market developments	• Exposure of contents • Course material • ActiveAdvice platform • Overview of additional platforms of interest
Reimbursement and administration • Reimbursement policies and practices - the local reality	• Exposure of contents • Course material • Decision tree
Communication and Human Relation • Communicability and communication modes • Interpersonal relations - integral and humanized • ActiveAdvice code of conduct	• Exposure of contents • Course material • Exercises and roleplay

6 Set up, starting and roll out

In section C - Course Outline, the general content has been described. The material modules will be developed in co-creation with the intended Authorised Active Advisors and professional educators from the various areas: gerontology, care and AAL technology. Both vocational and e-learning material will be developed as it is to be expected that potential human advisors will prefer one of them.

An educational specialist will be nominated by the consortium, roughly half a year before the expected start of the training will take place. This specialist will seek the educators and trainers, negotiate with them about their fee and plan the production of the material. These teachers might also be interested to play a role in giving parts of the vocational classes, although they most likely will only be available in a particular part of one of the countries. The teachers can be found at universities of applied sciences and recently pensioned professionals from industry and care organisations.

Once the material has been made and collected (see Course Outline, section C), it will be printed and set online (e-learning) in a password protected environment. The printed material will be handed at the start of the vocational classes, the password will be provided once the potential human advisors have subscribed and paid the fee for the course.

After the development of the initial material (in English) a test run of the course will be made, fist face-to-face and in a later stage presumably only online. Consortium members and others will be invited the follow the course and provide feedback for improvements and finalisation of the course material. At the end of this half year process, the material will be translated in the other languages.

6.1 Pre-launch

When the material is available in the different languages, a pre-launch for the course will be organised for, both, initial publicity, finding potential teachers for the vocational classes and potential human advisors. Potential teachers are active or retired professors of universities of applied sciences and retired persons from care organisations and companies, who feel attracted to do some extra paid work. Potential teachers will be visited in the different countries by the respective consortium members. Negotiations will be done on their availability and fees. It is recommended to pay a fee to the teachers, once they have been accepted, since this work cannot be assumed to be professional if only considered as volunteering work. At the end of the pre-launch period a first run of a vocational class and first 5-10 potential human advisors have finished the course.

As a preparation for the pre-launch, addresses for email notification must be collected, social media messages and advertisements in appropriate magazines and media must be planned.

As a simple start and to advertise the training concept, an e-learning platform can be launched containing some first, simple lessons.
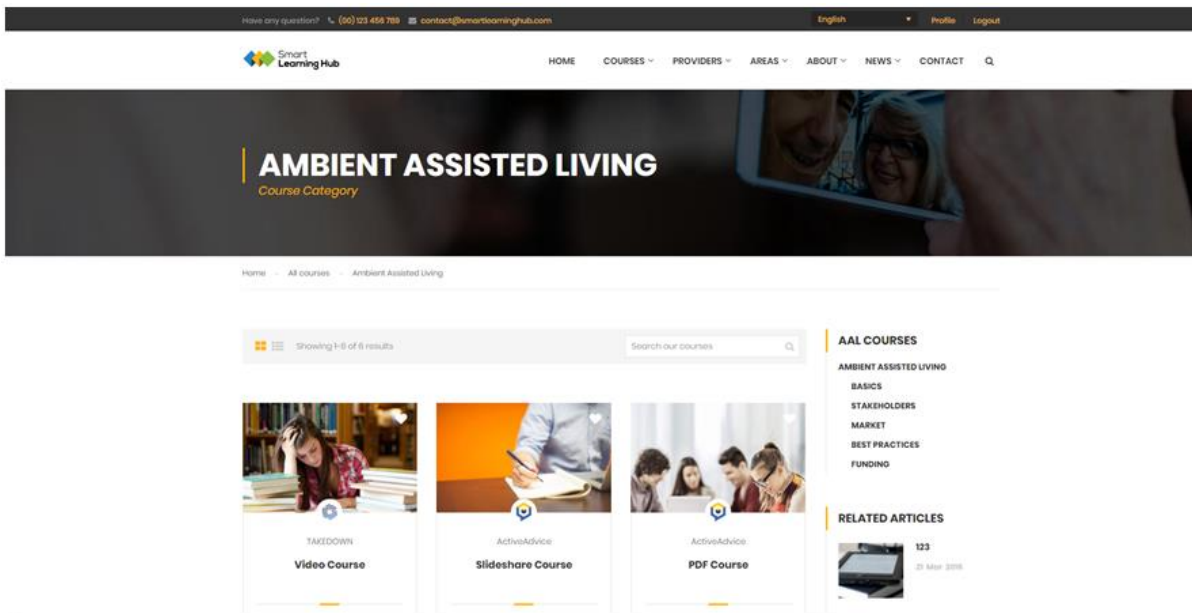
Figure 3: E-learning platform for Autorised Active Advisors within the ActiveAdvice framework

6.2 Launch

The procedure for the launch will be similar to the pre-launch, but more intensified. The launch of both types of courses will use more media and will carefully be planned such that the content of the ActiveAdvice platform is up-to-date and the full system is adequately working.

6.3 Price levels of the course

Before the actual launch of the course, it must be investigated what the minimum costs of the vocational class course will be and what will be charged to potential human advisors. Also, these classes need presumably to be run both at daytime and in evenings. The e-learning course has also costs, but much less of course (no hiring of facilities, no catering, no fees for teachers). Margins for profit on the courses will be kept minimal, since it is to be expected that most potential human advisors will not be happy to pay large amounts of money for such learning. Most likely is that the professional organisations they belong to, will reimburse the course fee. But there will also be independent professionals, such as occupational therapists, who will need to invest in the course themselves.

7 Authorised Active Advisor Community

Questions in the advisory process can be very specific and sometimes only be answered by specialists in a particular domain. Therefore, Authorised Active Advisors can benefit from the European scope of the ActiveAdvice platform and the connection with other registered advisors. Furthermore, advice in AAL needs a multidisciplinary approach, taking into account different areas of expertise (from general knowledge about the ageing process to ICT and e.g. questions of interoperability to questions of reimbursement and the national legislation, as outlined above). Thus, working in a team of advisors allows to share specific knowledge and expertise on different topics. A community, then, can function as a kind of backup if an Authorised Active Advisor is unsure about a specific question or topic.

Therefore, this chapter aims to explore possibilities on creating such a community of advisors, identifying the challenges and opportunities of different channels of communication. It is important to note that online channels are of a distinct benefit for the scope of ActiveAdvice, as they (i) allow advisors to exchange knowledge and expertise across geographical borders, and (ii) can allow a time-independent knowledge exchange. Still, face-to-face contact is probably preferred, and the feeling of community can be strengthened during group training sessions and/or meetings.

7.1 Identified Channels

The following channels have been identified as possible means for creating a community of Authorised Active Advisors:

- Facebook
- LinkedIn
- YouTube
- Closed forum on the platform
- Blog
- Other channels

Each of these channels has benefits, as well as challenges for creating a community, and for ensuring ongoing activities and exchange. In the following, these benefits and challenges are described for each of the identified channels.

Table 6: Benefits and challenges of different channels

Channel	Benefits	Challenges
Facebook	• building on already existing communities • easy-to-use tool • Possibility to share information material	• people not using (or refusing to use) Facebook & exclusion of people without an account • need for (external) moderator to check/administer members (closed group)
LinkedIn	• building on already existing communities • easy-to-use tool • Possibility to share information material	• people not using (or refusing to use) LinkedIn & exclusion of people without an account • need for (external) moderator to check/administer members (closed group)

YouTube	• building on already existing communities • easy-to-use tool • possibility to share videos (e.g. explanation of a product)	• people not using (or refusing to use) YouTube & exclusion of people without an account • no privacy/difficult to create a community feeling
Forum	• no registration to facebook or any other social media channel, but can be used for login/authorisation • no dependency on third-party channels • directly integrated in the ActiveAdvice solution • Possibility to share information material	• need for moderator/ administrator
Blog	• already exists (Awareness Hub) • easy way to raise awareness and share knowledge • forum can be added to the articles • easy to use	• information might get lost, need to administer the blog • difficult to get discussions started

7.2 Other possibilities

Additional possibilities include messengers such as Snapchat or WhatsApp (allowing within a group to exchange knowledge, share materials, and discuss in an easy way).

All of the abovementioned channels have their own benefits and challenges. In conclusion, therefore, the best way to engage a community is to make use of a mixture of channels. Using multiple platforms allows for a best possible mixture of media (e.g. video, text, photo). This will also ensure to create an audience within the public sections of this community, e.g. via the Awareness & Information Hub, reaching out to the AAL2C group.

All channels will initially be very time consuming: answering questions, administration, keeping the group active and similar activities require time, effort and patience. Therefore, it is also wise to start with a small community growing slowly. This way, the community is easier to manage and more interaction will be ensured. Lastly, it is important to include other communities such as patient groups, interest groups, or others.

9 Conclusion

Authorised Active Advices, as a human component complementing the digital advisory framework, have a distinct added value to the decision-support ActiveAdvice can provide; and thus, are one of the core concepts of the project. They have the potential to impact the uptake of the ActiveAdvice platform. They fill a gap a digital environment cannot provide, i.e. the possibility for personal contact (which increases trust), context knowledge for the individual situation, thus boosting confidence, especially of older users of the platform.

Advice is the key service provided by ActiveAdvice; and this has the potential to bring significant benefits to people using the platform. Authorised Active Advisors, thus, impact the ActiveAdvice project considerably. Older adults, as well as their relatives, informal caregivers and professional caregivers, want to learn about the benefits and challenges of products; or, indeed, what products exist and how they can make their lives easier. We learned previously in the ActiveAdvice project that older adults, as well as their relatives, have a preference to receive advice personally. The human advisor concept allows the advice to be personalized which constitutes a major benefit since it gives response to the users' needs. However, the value proposition of the Authorised Active Advisor contemplates benefits for all three target groups of the ActiveAdvice project, not just the consumer group - which, nevertheless, is the most important in this aspect. The Authorised Active Advisor will guarantee that there is a proper response to the consumer real needs, articulating those with the right product/solution and avoiding, at the same time, an information overload that could be harmful to the advisory process. The existence of an Authorised Active Advisor, furthermore, will contribute to tackle social isolation by establishing a human interaction, which consequently will have a major impact in gaining user's trust. By developing confidence among older adults in using online channels, the Authorised Active Advisors will help them to regain self-confidence and become more independent.

A main challenge during the project was the decision on a specific profile for Authorised Active Advisors, as there are a number of possibilities - from volunteers to professionals to businesses themselves. Therefore, we aimed to identify the best approach in our exploration. Two such profiles were identified: (i) AAL product developers, AAL consultants, ageing / care sales and marketing professionals, and (ii) social workers, social educators, gerontologists, and occupational therapist / professionals. These Authorised Active Advisors primarily work in either an existing organisation or business within the ageing and care market (AAL product development, AAL advisory, sales and marketing, social care organisations, education, and governmental bodies) or have practical care / medical experience and know-how in dealing with older people (i.e. gerontologists, occupational therapists, social educators, etc.).

Main task of the Authorised Active Advisor is to assist the individual person in finding the right solution for their problem or goal. They, thus, (i) have to be able to listen to the needs and translate those into a search strategy that complements the digital advisory component; (ii) be able to identify relevant solutions and suppliers, and to assess their pertinence towards each situation; (iii) to assist and guide the individual during the decision-making process; and (iv) to follow-up on satisfaction and stimulate users to provide feedback on the platform.

Based on these competencies, we were able to identify two main areas in which human advisors must demonstrate knowledge and expertise: (i) social skills and (ii) knowledge about ICT and/or AAL, with the former considered as more important than the latter. This is important to note when creating a training profile; as such soft skills are - to a certain degree - something potential Authorised Active

Advisors should already have. A first training index was outlined, with the specific parts still to be filled in a co-creation process together with the identified profiles for Authorised Active Advisors.

In addition to the training concept, we learned about the importance of a community. Questions in the advisory process can be very specific and sometimes only be answered by specialists in a particular domain. The European scope of the ActiveAdvice platform is thus both a benefit, as well as the challenge from which the need for human advisors arose. Advice in AAL needs a multidisciplinary approach, taking into account different areas of expertise (from general knowledge about the ageing process to ICT and e.g. questions of interoperability to questions of reimbursement and the national legislation, as outlined above) - these areas are reflected in our training outline. However, to gather relevant expertise in all of these fields might still be a challenge. Thus, working in a team of advisors allows to share specific knowledge and expertise on different topics. A community, then, can function as a kind of backup if an Authorised Active Advisor is unsure about a specific question or topic.

Next steps – not possible during the project lifetime, but necessary for the successful market entry of ActiveAdvice – therefore include (i) to communicate and advertise the human advisor concept, (ii) to co-create trainings based on the present training concept with the first registered Authorised Active Advisors; (iii) to create of a community of Authorised Active Advisors; and (iv) to start the roll-out and launch of the trainings.

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Annex A

Table 7: Human advisor interviews

No.	Interviewée	Gender	Profession/organisation type
01	**Age UK manager**	M	Manager, Age UK (charity that provides advice and support to elderly people)
02	**CEO Alertacall Ltd**	M	Business - AAL product developer who is in touch with customers
03	**Cumbria County Council**	M	Manager of Cumbria County Council telecare contract The County Council has a contract with Wellbeing to supply AAL equipment. Social worker and occupational therapist develop care packages. Broker buys them over online platform (by Wellbeing, woh monitors installation progress). Handling of enquiries from public over single point of access.
04	**Health Partnership Manager, Cumbria CVS**	F	3rd sector advisory in health and social care
05	**Majikhouse Ltd**	F	Provide smart home integration of number of technologies Sells systems to homeowners, targeting relatively wealthy people Target market: affluent people in North West England
06	**Owner of company specialising in adapting houses for longer living at home**	M	Specialising in adapting houses for longer living at home
07	**Formal Caregiver - WitGeleKruis**	F	Nurse (formal caregiver) WitGeleKruis offers few products to end users: alarm buttons, medication dispensers, sensors, surveillance systems
08	**IT teacher for seniors**	n/a	IT proficiency classes for seniors
09	**Manager (Geschäftsführung) AWZ Soziales Wien GmbH**	F	Organisation contracted by the government Eligible for both G1 and G2 Offers advice on products and services Management position
10	**CASO50+**	F	non-profit organisation dedicated to the intervention and study of problems related to the older population develops activities in the field of health promotion, well-being, active ageing and quality of life of older adults
11	**Dean of Santa Maria Health School | Founder and President of the Association Caregivers Portugal**	M	
12	**EURAG**	F	mid-level management position in an organisation providing advice on products & services organisation without state support providing advice on products & services

13	**City of Alkmaar, elderly consultant**	n/a	
14	**City of Alkmaar, customer manager within the WMO**	n/a	
15	**City of Alkmaar, front office employee within the WMO**	n/a	

Table 8: Human advisor workshops

Date	Participants	Setting
1 October 2018	5 participants	Slimste Huis Alkmaar
25 October 2018	9 participants	Workshop 11, AAL Forum 2018

Annex B

HUMAN ADVISORS TRAINING - INDEX