hiStory D5.2 User Training and Manual

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Table of Content

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Short Description

This report details the development of the user manual for a hiStory story telling project: the manual for the older adult participants containing information and instructions on how to join a project and use the hiStory app, and the facilitators manual consisting of a detailed Roadmap, materials and procedures on how to realize and coordinate a storytelling project using hiStory toolsets. An overview is given of the goals, design and content and the iterated creation process of the user manuals. All materials shall be evaluated in "Task 5.3 First Field Trial" which had to be postponed to September/October 2020 due to CoVID-19- related restrictions. Findings which will be reported in "D5.3 First Field Trial Evaluation Report" will be used to improve the procedures and materials. The Appendix provides the latest version of the facilitator manual and the evaluation form for the in-between-field trial.

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1 About This Document

Aim of the overall project hiStory is to foster social inclusion of older adults by providing interactive services, based on storytelling. This is being executed by multiple moderated interactive sessions in which participants use digital and analogue tooling. Social, health care or cultural organisations can use hiStory to prevent loneliness by engaging older adults in a hiStory project.

As described in more detail in "D2.1 Service Design Specifications" and in the user journey in "D2.3 Essential Use Case Specifications" the organisation of a storytelling project will be overseen and executed by a facilitator, one or more persons designated for this project, either from the health care or social organisation itself or someone external (volunteer or hired).

To guide the organisation through the process of executing a project, hiStory designed several manuals to help and support the participants and the facilitators in two iterations that happened in January 2020 and October 2020.

This deliverable describe the description of the process of making the manuals for the participants and facilitators and contains the latest version of the manuals.

In the initial setup of the project, a user manual was discussed for participants and facilitators. Throughout the process of collecting use feedback and designing the manuals for the facilitator and the participants, it became increasingly clear that the role of the facilitator in guiding the participants and organising the project is essential. Therefore, greater emphasis has been placed on the manuals for the facilitators, and the manuals for participants has so far been limited to a technical handbook. In the next chapters we will elaborate on this new emphasis.

Moreover, this document contains the description and results from a supplementary activity not initially planned in the DoW, the in-between Field Trial. At the Consortium Meeting in March 2020 the consortium decided to postpone the First Field Trials which were initially planned to happen between April and June 2020, due to the CoVID19-related restrictions. Instead and in order to keep working on the advancement of the service design and tools, the so-called "in-between field trial" was set up to elaborate on the materials for facilitators and older adult participants. Procedures and results from this intermediate activity are described in 2.3 for the feedback from older adults and in 3.3 for the facilitators materials. Hence an intermediate update of the first release of this report available by January 2020 (v1) was undertaken in October 2020 (v2).

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2 Participant Manual

2.1 Background & Goal

During a storytelling project invited participants are guided by a facilitator to make use of several tools, digital and analogue, to work on their story telling during as well as between the storytelling sessions in the group.

The analogue tools, the cards (see "D1.2 Service Design Specifications"), are mainly used in the 'live' meetings with other participants and the facilitator. These meetings are being held by the facilitator, in which the facilitator has the responsibility to introduce and explain the analogue tools. The participants are being guided by the facilitator in the use of the cards, and since the use of it occurs live in the meetings, there is no need for a written manual for the analogue tools for the participants. The use and explanation of the analogue tools are therefore only part of the manuals for the facilitator.

The digital tools the participants use in the project, the platform (website) and application (app on mobile device) to record and view the told stories, are being used during and also after the storytelling sessions. The participants first get introduced to the digital tools within the meetings. This way, the facilitator can explain the tools elaborately and guide the participants through the process of downloading the app, learning how to use the app and finally how to navigate in the website. After the meeting, the app and website are still available for the participant, and it can even by encouraged to use the app at home, with homework task and assignment to prepare stories for the next meeting.

Therefore, these tools are designed to be used independently by the participants, in the meetings, but also at home in their free time to record new stories on their own. It is even possible to record other stories independently from the project they participate in. Therefore it is necessary to also create a manual for the app and the website, so participants can get instructions and support how to use these digital tools, outside of the live meetings. The instruction on the website and the app will be part of the facilitators manual.

2.2 Design & Content

The intended participants of a hiStory project are foremost older adults. This means the manual should be designed toward this target group, with understandable language, especially concerning the digital element. The writing of the manual was an iterative process, in which every concept was adapted based on the feedback of the consortium as well as user feedback in the co-creation workshops in "Task 2.1 Co-Creation / Service Design".

Figure 1. First version of user instruction

The first version of the manual for participants was a more textual document, with descriptions and instructions, with instructions on how to download and use the app (see Figure 1). The platform (the logging in part of the website) is not yet developed for the participants. See below (next pages) for an impression of the first concept.

2.3 In-Between Field Trial

This first concept of the participants' manual was supposed to be tested in the first field trials in April 2020. However, due to the Corona and lockdown situation in all partner countries, the first field trial had to be cancelled. As a consequence, during the Consortium Meeting held online on 26th of March 2020 the consortium decided to postpone the first field trials to Autumn 2020. Preventing from vacant times, instead an intermediate activity was arranged to gather user feedback and improve the hiStory tools, especially from a facilitator point of view. As such in this in-between field trial we planned to conduct

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interviews with potential facilitators (FA Test) and running a small storytelling session with a facilitator and a small group of older adults (OA Test).

2.3.1 Goals & Research Questions

For the test with the older adults (OA), the objectives of the test were testing whether we provide OA with the right materials and whether OA understand the provided tools (Analogue tools, app). Main questions to be answered were:

- Do we provide an OA the right materials?
- Does the OA understand the provided tools?

We wanted to make sure that a future older adult participant knows what's expected of him/her, as reflected by statements such as:
- 'The slides helped me to understand what to do and what's expected in this session.'
- 'I liked the way the canvas kept track of the progression while recording stories.'
- 'I understand the PWA, how it worked and the relation with the canvas.'
- 'I understood we were working towards an end result we can share with friends and family.'
- 'I enjoyed the session!'

2.3.2 Procedure

The in-between-field trial involving OA was realized the Netherlands with a group of older adults. Detailed guidelines for the older adult test (OA Test) can be found in the Appendix 4.4.

2.3.3 Results & Implications

In The Netherlands the participants manual as described above, was implemented in the presentation of the facilitator and not separately distributed amongst the participants. It was however, it was still possible to collect feedback based on observation and discussions with the participants. This gave more insight on how participants experience working with the app. It became evident that downloading the app was not always so easy for the participants. Some smaller in between steps in the download process, such as giving the app permission for the use of the microphone, created confusion with the participants. It became clear that the instructions needed to be more elaborate and needed to guide the participants every step of the way.

With this feedback the manual was adapted in a second version. This second version was prepared for the first field trial in September/October 2020 (also see "D5.3 First Field Trial Evaluation Report"). The instructions became more visual and extensive. All elementary steps are being explained and where possible, visual elements like screenshots and arrows to indicated what the instruction is about, were added so participants can recognised the elements and buttons from the app or website directly in the instructions.

Because the manual for the participants is mainly for digital tools, the chosen set up is now completely instruction-like, with chronological steps to follow, not a lengthy handbook. See examples in the next pages on how these changes were made.

3 Facilitator Manual

3.1 Background & Goal

Since the facilitator is the main person who sets up a story telling project, guides the participants and co-creates the end result, a manual for facilitators is indispensable. To determine what exactly the manual for the facilitator needed to entail, the consortium dedicated a workshop to the facilitator's manual during the virtual consortium meeting on the 26th of March 2020. In this workshop the goal of the manual, the format, the setup and the first concept of the manual was discussed.

In this very productive brainstorm session on the goal of the facilitators manual we asked ourselves, 'who is a facilitator?', 'what kind of person is the facilitator?', 'what kind of skills and characteristics has a facilitator?'. A large list of features was collected and discussed (see below for examples).
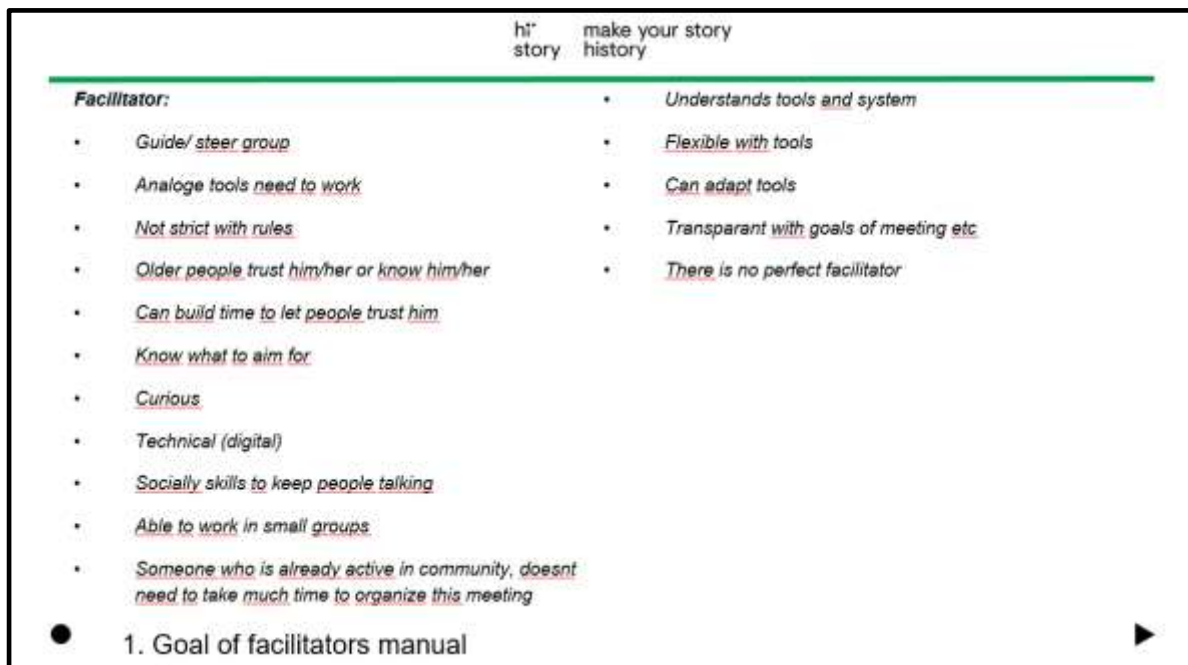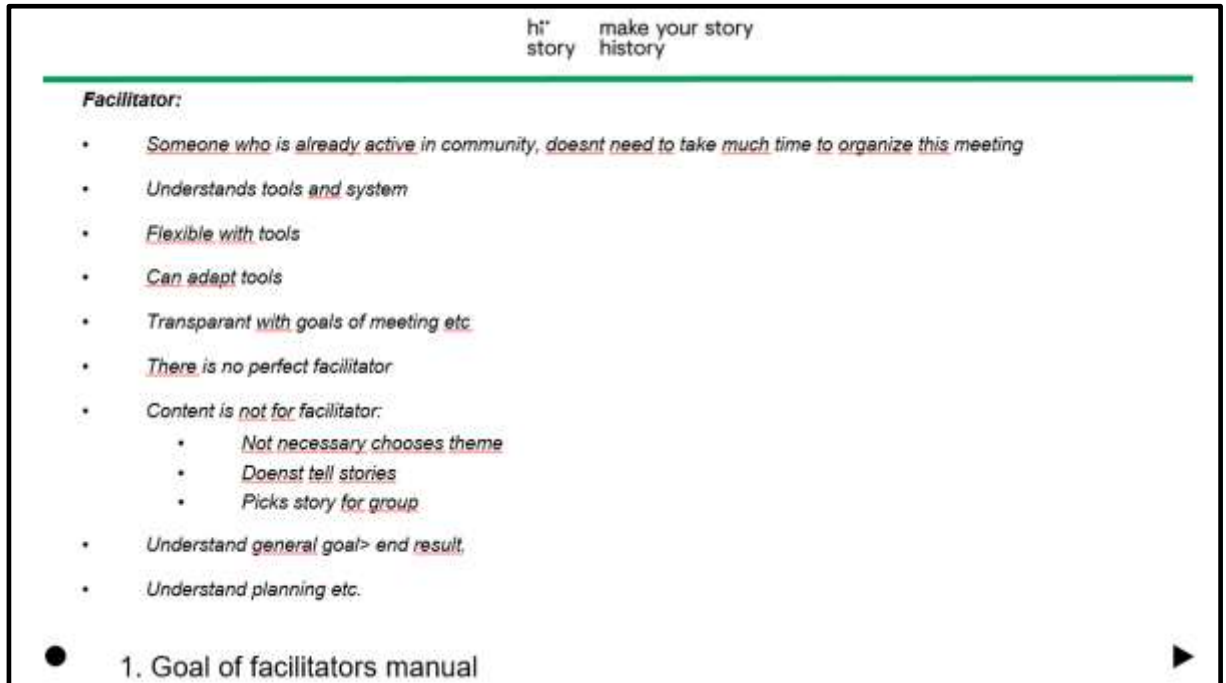

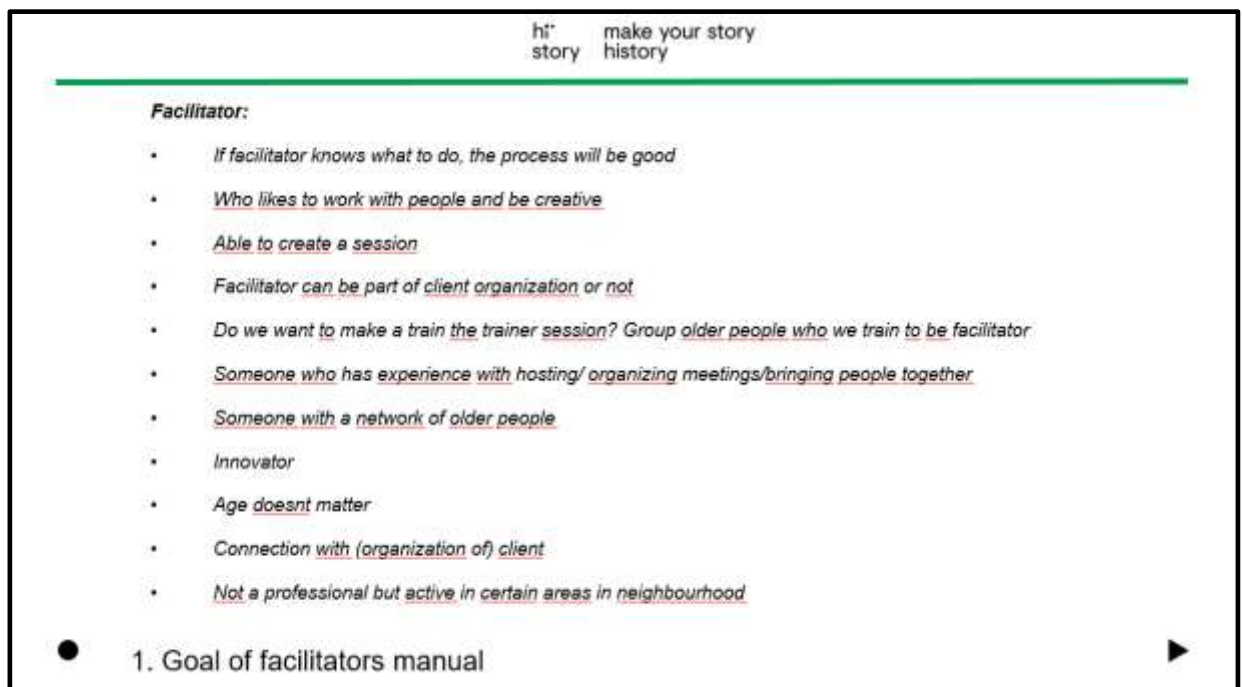Figure 2. List of features of an ideal facilitator slide I

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Figure 3. List of features of an ideal facilitator slide II

Figure 4. List of features of an ideal facilitator slide III

All these elements were summarized in the following three main criteria:

1. *Facilitator feels confident and exited to organize the meetings*
   a. Good balance between information/guidelines for facilitator and freedom to adapt as fits for facilitator and group
2. *Facilitator is focused on the general goal (the end result)*
   a. Able to select stories and create an end result
   b. Able to create a nice social group (prevent isolation/loneliness)
3. *Facilitator has the needed knowledge and skills to organize and execute meetings*
   a. For each step in the organization of meetings the facilitator needs information to prepare and execute that step
   b. Practical instructions

Based on these criteria, the following goals for the manual were determined:

- <u>Motivates and persuades</u>:
  The manual brings across that a hiStory project is fun and interesting. The manual gives the facilitator information and instructions, but as a suggestion, and leaves room for the facilitator to adapt the suggested instructions to the needs of the group and the facilitator. This way the facilitator is enthusiastic and not overwhelmed about the project when reading the manual.
- <u>Gives information on overall goal and background of a hiStory project (why?)</u>:
  The manual explains why an organisation can use a hiStory project and lists preventing loneliness as the reason behind the process and project. It also describes the importance of co-creation. The end result of the project should be a joined result of a story telling process through which participants also created a larger social network and experienced an increased self-worth.
- <u>Gives step by step instruction on practical organisation and facilitation of the project (how, when?) and gives tips and tricks on guiding a group of participants (how?)</u>:
  The manual gives practical instructions on execution, planning and how to use the analogue and digital tools. With these guidelines a facilitator is able to organise a story telling project on his/her own. The manual helps the facilitator with managing a group, with tips on teambuilding and how to keep the atmosphere during the sessions safe and playful.

With these goals as a guideline the manual for the facilitator was constructed. In the next pages, the content and design of the manual will be discussed.

3.2 Design & Content

In the workshop on the facilitator's manual during the virtual consortium meeting on the 26th of March 2020, the format of the manual was also discussed. It was decided that during the project we will work on a 'main' manual with all the information a facilitator

would need, available on the hiStory platform (website). The manual can be read online, and downloaded and printed if facilitators prefer this.
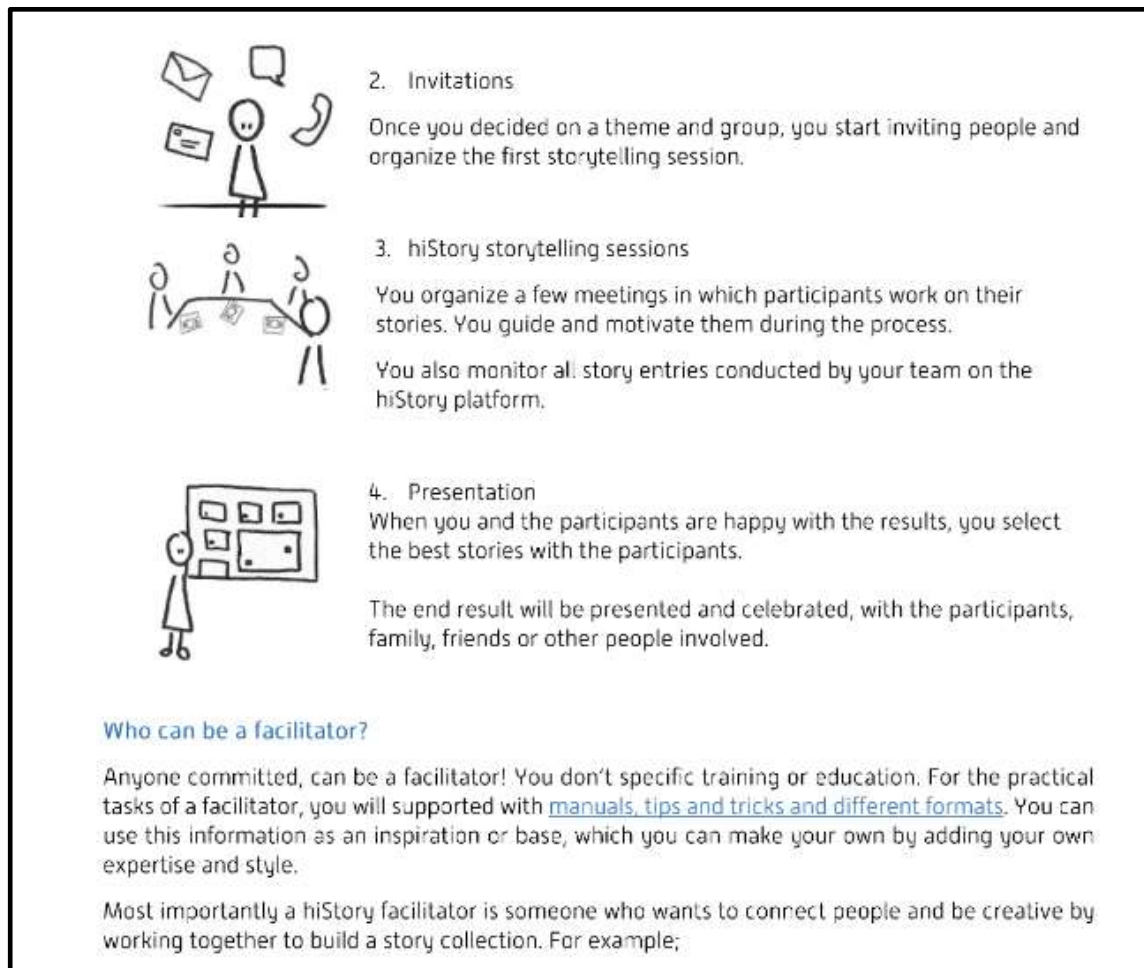
All manuals will be translated from English to German and Dutch. In a later stage of the project, it will be examined if a short version of the manual, for example in the format of a "Frequently Asked Questions" is useful. We will also explore the possibility to create a more attractive, lively way to inform the facilitator, by a video tutorial or animation video. However, this also depends on time and budget.

Again, like the participants' manual, the writing of the facilitator's manual was an iterative process, in which every concept was adapted based on the feedback of the consortium. Based on the goals of the manual as discussed above, the manual was split up in different elements, of which each covered one or more goals of the manual.

The first developed draft of the manual, after feedback of the consortium, consisted of:

- Synopsis
  A short introduction (3 A4) to the project and short overview of all the tasks, to inform and motivate and inspire the facilitator and to give a short insight in the overall goal of the project. This synopsis has the goal of motivating and persuading the facilitator.
- Manual
  The manual was a guideline with the different tasks and responsibilities, in the format of a kind of checklist for every step of the organization. The manual was textual and three pages long. This manual has the goal to give step by step instruction on practical organisation and facilitation of the project.
- Cards
  Several cards with short tips and tricks on different subjects, with the goal of supporting the facilitator with guiding a group of participants. The subjects of the cards were:
    - Icebreaker
    - Teambuilding
    - Time management
    - Feedback
    - Respectful exchange
    - What to do when participants get upset telling their story

On the next pages an impression of the first concept of these three components of the facilitators' manual is given (see Figure 5-6-7).

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2. Invitations

Once you decided on a theme and group, you start inviting people and organize the first storytelling session.

3. hiStory storytelling sessions

You organize a few meetings in which participants work on their stories. You guide and motivate them during the process.

You also monitor all story entries conducted by your team on the hiStory platform.

4. Presentation
When you and the participants are happy with the results, you select the best stories with the participants.

The end result will be presented and celebrated, with the participants, family, friends or other people involved.

Who can be a facilitator?

Anyone committed, can be a facilitator! You don't specific training or education. For the practical tasks of a facilitator, you will supported with manuals, tips and tricks and different formats. You can use this information as an inspiration or base, which you can make your own by adding your own expertise and style.

Most importantly a hiStory facilitator is someone who wants to connect people and be creative by working together to build a story collection. For example;

Figure 5. Impression of the synopsis for a facilitator

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> 3. Preparation, organisation and hosting a storytelling session
>
> In a couple of sessions, you guide the participants in their storytelling. During the session you will be the one to explain the goal of the project, the tools and the app to the participants. Afterwards you will upload the stories to the website.
>
> 3.1 Preparation session at home
> 3.1.1 Tools: Print and cut cards (print and cut cards, etc.) : *link cards*
> 3.1.2 Tools: Print extra consent forms and booklets
> 3.1.3 Gather needed supplies (e.g. pens, paper, name cards, ice breaker attributes, …)
> 3.1.4 Adapt and prepare Power Point Presentation: *link Powerpoint Presentation*
> 3.1.5 Prepare content of session
> 3.1.5.1 Familiarize with hiStory app and tools
> 3.1.5.2 Tips and tricks: *link Ice-breaker, Managing a group,..*
> 3.2 Preparation at the venue
> 3.2.1 Prepare room for session (e.g. drinks and snacks, position of chairs and tables, technical means such as beamer)
> 3.3 Storytelling session
> 3.3.1 Welcome the team of participants
> 3.3.2 Present PowerPoints with goal and process of session
> 3.3.3 Create stories with participants (session 1 and 2)
> 3.3.4 Select stories with participants (session 3)
> 3.3.5 End session with feedback session
> 3.3.6 Checklist session 1: *link session 1*
> 3.3.7 Checklist session 2: *link session 2*
> 3.3.8 Checklist session 3: *link session 3*
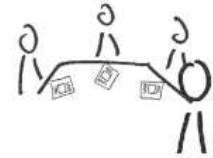
Figure 6. Impression of the facilitator's manual with a checklist

> **Ice breaker**
>
> It is always good to start a meeting with a warming up or an ice-breaker exercise. This way people get to know each other a bit and it creates a fun and casual atmosphere. You can choose an icebreaker matching to the theme of the meeting, the venue where the meeting is or the kind of people the participants are (e.g. sporty, creative, …). You can also choose an exercise opposite to these suggestions, to challenge people to think outside of the box.
>
> *Ball exercise*
>
> Let the participants form a circle together. The participants have to come up with associations with different words concerning one word you give. For example: start with the word 'SUN', throw the ball (soft and small) at someone and say the first thing that comes to mind, for example 'warmth'. The person who catches the ball has to say the first thing that comes to mind too.
>
> *Exercises relevant to story telling*
>
> • Let everyone say their favourite movie, book or writer and let them explain why.
> • Finish the sentence: A story moves you when….
> • Say your name and tell one of your favourite memory on …. Elaborate why this one is your favourite.

Figure 7. Example of the 'ice breaker' card

3.3 In-Between Field Trial

As mentioned earlier, the first field trials planned within "Task 5.3 First Field Trials" for April 2020 were postponed due to Corona. Instead, the first concept of the facilitators manual was tested in the in-between field trial in Switzerland, the Netherlands and Austria in June, July and August 2020.

3.3.1 Goals and Research Questions

In this facilitator test (FA Test) we aimed at learning to know:
- What questions and information are needed for acquiring facilitators?
- Is the right information provided to enable a person to become a facilitator (synopsis, manual, tips and tricks, how to)?
- Do FA understand the provided tools (website, analogue tools, app)?

We wanted to make sure that a future facilitator knows what's expected of him/her, as reflected by statements such as:
- 'The goal is to keep older adults (OA) integrated and prevent social isolation.'
- 'I'm going to start a project with (three) sessions and a group of people (incl. OA).'
- 'In these sessions I'm going to help them tell stories about a theme and create a nice end product.'
- 'As a facilitator I'm provided with digital and analogue tools.'
- 'I feel motivated to become a facilitator and use hiStory!'

3.3.2 Procedure

For the facilitators role, the test involved an interview with potential facilitators in which the synopsis, manual, cards for the facilitator and analogue (cards) and digital tools (app and website) were tested and discussed. Detailed guidelines for the facilitator test (FA Test) can be found in the Appendix 4.4.

In total 6 potential facilitators were involved:
- In Austria: two employees of the Wien Museum in their function as curators of exhibitions and organizers of visitors workshops
- In Switzerland: one oral history expert working with day activities for older adults in neighbour activities in Switzerland
- In the Netherlands: one volunteer (ambassador) for a LGBT elderly NGO(Roze 50+), one social worker in a nursing home and a one Communications Officer of the municipality of Zutphen

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3.3.3 Results & Implications

This resulted in very useful and detailed feedback on the manual for the facilitator.

Synopsis
Although the synopsis was "overall clear and provides a good first insight", the amount of practical details made the facilitators overwhelmed; "makes it seems too much work". A time indication for the overall timespan of the project was missing. More so, the amount of details created a sense of obligation, while there should be an emphasis on the possibility of an own interpretation or use of the offered tools. Facilitators need to feel the freedom to be creative and make it his/her own. Lastly, the testers were missing the overall purpose of hiStory (e.g. prevention of loneliness). It needs to be clear and more elaborate why an organisation or facilitator would start this project.

Manual and cards
The manual was overall perceived to be too 'dry', potential facilitators recommended more visual aspects or the use of infographics. Although there was a good structure and clear information, the 'spontaneity of the process' was missing and the document lacked 'motivation to organize the project'. In the manual, the checklist with links to other documents (such as the cards) was not very practical for facilitators. Suggestion was a 'master manual'; one document with all necessary information for the facilitator including the manual, step-by-step session instructions, tips and tricks instead of multiple files and documents.

After the in-between-trial, based on the feedback as described above, the facilitators manual has been rewritten. Again, in an iterative process with feedback from the consortium, a second version is created. Below, a description of the changes made to the manual is given. This entire last version of the manual can be found in the Appendix 4.2. This concept will be used and tested in the postponed field trials of September/October 2020 (see 3.4 and "D5.3 First Field Trial Evaluation Report").

Synopsis → Flyer
In the newer version of the synopsis we wanted to emphasis the overall goal of motivating the facilitator (see Appendix 4.1). The synopsis is therefore rewritten in a flyer, which inspires and informs the facilitator. The flyer is only one page long and focusses on the overall goal of hiStory (why would the facilitator do this project?) and give a short overview of how the project can work (how?), while underlining the fun of organizing this project. This keeps in mind the feedback to make the document lighter, less obligations and details and more suggestions and more background information on the project itself.

Manual and Cards → "Introduction to Roadmap" and "Roadmap"
Taking into account the feedback, we created one document in which now all information is gathered. To create a fun and inspiring manual, we designed the document as a visual Roadmap for the facilitator. The Roadmap shows the whole process of the project in a

step by step manner. The facilitator can use the entire Roadmap and follow the whole track, or he/she can pick and choose and use the suggestion Roadmap as a starting point to create his/her own road.

The "Roadmap" is a document divided in four 'roads' for four sessions, each of them with a short goal description, a short checklist, tips and a suggested timeline. At the beginning, there is a short introduction with an overview of all the tools mentioned or used in the Roadmap and the project. The visualisation is in the same style as the analogue tools and the design of the website. The Roadmap is now a document that can easily be used by facilitators in a flexible way. Through this Roadmap, the goals of the manual 'Gives step by step instruction on practical organisation and facilitation of the project (how, when?) and gives tips and tricks on guiding a group of participants (how?)' are being met. Figure 8 gives an impression of the Roadmap. Again the flyer and the Roadmap are translated in German and Dutch.
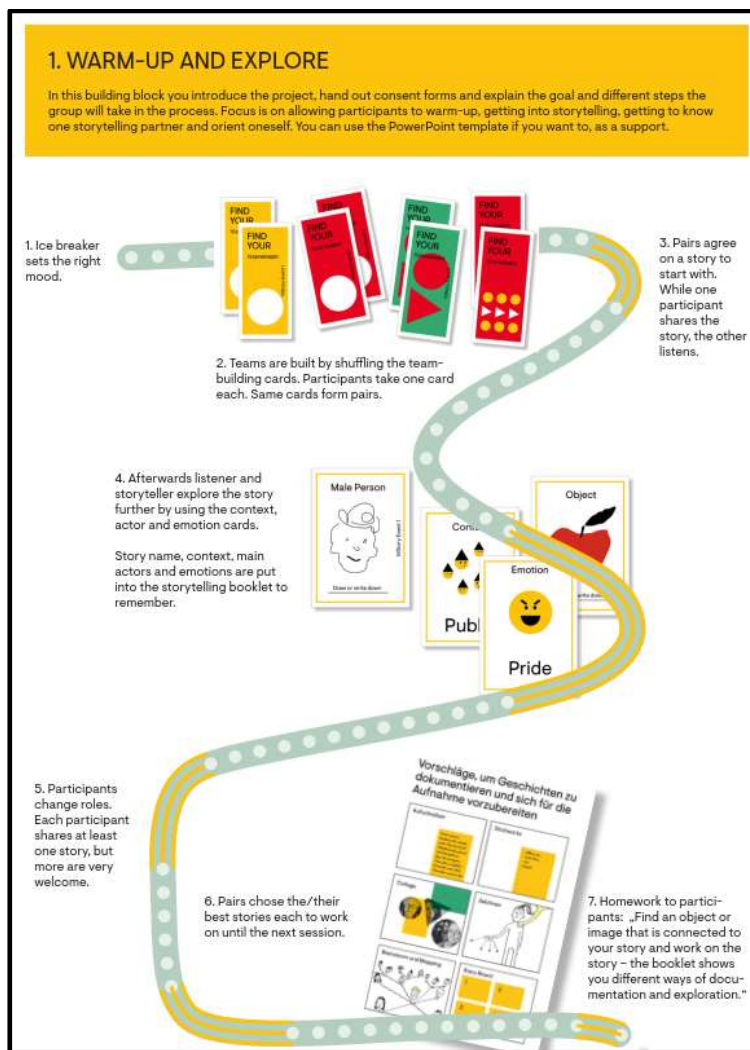

Figure 8. Impression of the Roadmap

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The complete "Introduction to the Roadmap" can be found in Appendix 4.2, the "Roadmap" can be found in the Appendix 4.3.

3.4 Next Steps

The last version of the manual (the flyer and the Roadmap) is evaluated during the field trials in September and October 2020. However, because of Covid-19, some of the sessions of the field trials are postponed and some are reprised in a modified format which will be evaluated in WP5 and reported in "D5.3 First Field Trial Evaluation Report" and not all evaluation data was collected at the time of writing this report. When all data is collected and analysed, the facilitator's manual will be refined with the feedback from the first field trial. Here, we will discuss preliminary feedback we gathered during observation of the trial and new ideas we developed to refine the flyer and Roadmap.

Flyer
For the third version of the flyer we would like to design a more visual appealing and 'fun' flyer, in style with the Roadmap. Where possible, the information will be displayed with infographics or drawings. We will explore the options to create the flyer in a pamphlet format, e.g. in A2 or A3.

Roadmap
During the session of all sessions held with participants so far, the importance of a good group atmosphere became very clear. The storytelling project is based on participants coming together and working together on telling and recording stories. When participants don't feel safe, comfortable or don't enjoy being in the group, they will not be open, active or will even stop participating. This means the facilitator needs to pay a lot of attention to the guidance of the participants, creating a safe atmosphere and making sure every participant will get the required support.
For the next version of the Roadmap, there will be more emphasis on the importance of creating a safe atmosphere, which challenges can appear during this process and how the facilitator can handle such challenges.

The final iteration of the materials reported in this deliverable will be documented as planned by end of project year 2 (March 2021) in order to have all materials ready for the evaluation in Task 5.4 Second Field Trials.

4 Appendix

In this appendix are the latest English versions of manuals for the facilitator, which are used in the "Task 5.3 First Field Trials". All manuals are translated from English in German and Dutch for the trial. Other, older versions of the manuals, both for participants and facilitators, are not included here because of the sizes of the attachments, but are available for reviewing.

4.1 Flyer

hiStory FLYER

Do you want to fight loneliness in your community? Do you enjoy organising and bringing people together? Are you interested in fostering oral history? Do you want to support older adults to tell their stories? But you need a creative and innovative way to bring all these elements together?

Use hiStory to create time capsules, with an easy and fun method, bringing groups of older adults together, digitally record their memories, fill the time capsule with their stories while engaging them in social inclusion.

Why hiStory?

HiStory uses the concept of storytelling as to socially activate older adults. By creating a time capsule full of their own told memories together with others, older adults become (more) socially connected and cognitively active. Sharing their memories helps to maintain their confidence and self-esteem and contributes to successful ageing. Older adults have a lot of interesting stories to tell and with a time capsule personal anecdotes can be included in the collective memory of a family and friend, or even a bigger community. The capsule can for example be offered to cultural institutes to include personal stories in museum tours or schools to provide stories to their students. This way the personal memories from participants are transformed into a source for learning and gaining new knowledge.

How does hiStory work?

Whether you are a social or care organisation acting, or independent volunteer or initiator, hiStory provides an app, a ready to use web portal and unique play cards to inspire and guide you and the participants in the storytelling process. With these easy and creative tools, hiStory gives you the stepping stones to make a successful time capsule with your participants.

After choosing a theme and target group, you gather small groups of older adults (or mixed generations if you prefer). With the help of the specifically designed play cards the participants can get inspired to tell their stories and improve their storytelling skills. With hiStory Smartphone App the participants can voice record and modify their stories. As an organiser you will find Roadmaps, formats and the application to create the actual time capsule on the personalized hiStory webportal . but how you organize the storytelling project is completely up to you.

A whole project storytelling can take as long as wanted. Depending on your needs and goals, creating a hiStory time capsule can take from an intense 3-day program to a longer period with regular sessions such as 2 months.

Interested to host a storytelling time capsule project to support older adults and fight loneliness? Then contact us to know how to start a hiStory project in your area!

* hiStory has been developed within the research project "hiStory – make your story history", partially funded by the European Active and Assisted Living Joint Programme and the National Funding Agencies from Austria, the Netherlands and Switzerland.

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4.2 Introduction to the Roadmap (pdf attachment)

4.3 Roadmap (pdf attachment)

4.4 Older Adult OA Test procedures and guidelines (In-between trial, June 2020)

The following guidelines can be used for the OA Test with OA involving e.g. 2 OA in NL. In this document the following terminology is used:

- Tester: Project partner conducting FA test / small field study i.e. VIC, NFE, ZUT, AIT, SDA
- Testee: candidate for becoming a facilitator in the FA Test
- FA: person taking the role as a facilitator in small field study
- Participant: OA person participating in a storytelling project
- Storytelling project / project: storytelling project organized by FA on a given theme
- HiStory research project: underlying activity in the AAL project

Step 1: Session Phase

Objectives
- Design, develop and/or create testables:
  - What we need for testing the **sessions phase**
    - Facilitator Website > Slides (1, 2, 3, 4, Canvas, 5, 6)
    - PWA
    - ~~Analogue Tools (PDF)~~
  - Start a project with:
    - Theme
    - Team (6 persons of which at least 2 are testees)
    - Date for the first (and only) session
      - NB: The session in this trial will be a combination of the planned session 1 and 2; *start with stories and record them*
    - Booklet & Slides
- The questions we want answered in the **sessions phase**
  - Do we provide an OA the right materials?
    - Does the OA understand the provided tools?
      - 'The slides helped me to understand what to do and what's expected in this session.'
      - 'I liked the way the canvas kept track of the progression while recording stories.'
      - 'I understand the PWA, how it worked and the relation with the canvas.'

- 'I understood we were working towards an end result we can share with friends and family.'
- 'I enjoyed the session!'

Procedure (90 min)

1. Invite testees for the first (online) session by inviting them and sending them a booklet (-)
2. Do the first (online) session (80 min total)
   a. Start the session with a **welcome** (online by sharing the screen with the related slide (1) while maintaining video of testees) (5 min)
      i. Answer optional questions
      ii. Make notes of questions and observations
   b. Start the session with the **ice breaker** (online by sharing the screen with the related slide (2) while maintaining video of testees) (5 min)
      i. Answer optional questions
      ii. Make notes of questions and observations
   c. Start the session with the **creation of stories** (online by sharing the screen with the related slide (3) while maintaining video of testees) (10 min)
      i. Answer optional questions
      ii. Make notes of questions and observations
   d. Let the people (OA) **download and start the PWA** (online by sharing the screen with the related slide (4) while maintaining video of testees)
      i. PWA: Show the testee how to perform the tasks while testee gives feedback doing thinking aloud (30 min)
         1. Onboarding, Home screen and menu
         2. Record new story
         3. Edit (new) story
         4. Edit existing story
         5. Canvas
      ii. Start the workshop with the **PWA** (online by sharing the screen with the canvas while maintaining video of testees) (15 min)
         1. Answer optional questions
         2. Make notes of questions and observations
   e. BREAK

   f. **Finish** the workshop (online by sharing the screen with the related slide (5) while maintaining video of testees) (5 min)
      i. Answer optional questions
      ii. Make notes of questions and observations
   g. **Optional**: Analogue tools / session concept and guidelines (10 min)
      i. Present the tools and guidelines
      ii. Note comments and impressions from testee
3. Finish the session (online by sharing the screen with the related slide (6) while maintaining video of testees) (20 min)
   a. Discuss results with testee(s)
      i. Ask questions and make notes of given feedback and how we might improve

Interview Protocol Templates

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OA Test Evaluation June 2020	
Date and time	
"Live" or via telephone/ Skype/… Place?	
Tester	
Participants (amount)	
Participant's name	
Participant's age	
Participants occupation	
Participant´s prior experience with HiStory	
What is our motivation to participate?	
As a participant, when would you describe your participation as successful?	
Selection participants	
How did you establish your choice of participants? (Already participated in HiStory, suggested via via, …)	
General remarks?	
Introduction (project presentation and informed consent)	
Has the project purpose/background been understood, accepted?	
Questions & understanding regarding filling Informed consent?	
Building teams and starting dialogue	
How did couple building with the team cards go? Positive/negative? Remarks?	
Testing of the materials session 1	
Were the focus cards used? Why not?	
If used, comments on the focus cards? Positive/negative? Remarks?	
Who tells what? How does storytelling happen? Barriers?	
Did the booklet provide the right information to inform the participants about the goal of the session (Goal session, preparation,…)? Why not?	
Is the booklet used for note taking?	
What was positive in the booklet?	
What was missing?	
Suggestions/questions?	
Were the context, actor, emotions cards used? Why not?	

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If used, comments on the context, actor, emotions cards? Positive/negative? Remarks?	
What was the first impression of the tools (booklet and cards)?	
Overall thoughts on design tools?	
Overall thoughts on functionality tools?	
Testing of the materials session 2	
How did couple building with the team cards go? Positive/negative? Remarks?	
Is the booklet used for note taking?	
Were the feedback, colour feelings, association cards used? Why not?	
If used, comments on the feedback, colour feelings, association cards? Positive/negative? Remarks?	
Were the team cards used? (comparison, talk later, story to add? Why not?	
Positive about the cards? Negative? Comments?	
What was the first impression of the tools (booklet and cards)?	
Overall thoughts on design tools?	
Overall thoughts on functionality tools?	
Testing of the materials: app/website session 2	
What was the first impression of the app/website?	
Add notes from app interaction with think aloud here:	
Did the app/website provide the right information for the participant? (user friendliness)	
Did the recording work? Why not?	
Could the participate personalize the story? (Tags, location....)?	
What was positive about the app?	
What was missing?	
Suggestions/questions?	

4.5 Facilitator FA Test procedures and guidelines (In-between- trial, June 2020)

The following guidelines can be used for the FA Test as well as be extended for In-between field trial. In this document the following terminology is used:

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- Participant: OA person participating in a storytelling project
- Storytelling project / project: storytelling project organized by FA on a given theme
- HiStory research project: underlying activity in the AAL project

Step 1: FA Invitation
Objectives
To learn

- what questions and information are needed for acquiring facilitators
- whether we ask the right questions and provide the right information to motivate a person to become a facilitator

To make sure that the facilitator knows what's expected of him/her, as reflected by statements such as:

- 'The goal is to keep older adults (OA) integrated and prevent social isolation.'
- 'I'm going to start a project with (three) sessions and a group of people (incl. OA).'
- 'In these sessions I'm going to help them tell stories about a theme and create a nice end product.'
- 'As a facilitator I'm provided with digital and analogue tools.'
- 'I feel motivated to become a facilitator and use hiStory!'

Procedure

- Invite a FA testee to facilitate a project based on preliminary information about History project and purpose.
- Provide project synopsis
  - Per mail, print out, ...
  - if the FA testee is interested, make an appointment (Live vs. remote (phone or video call))

Step 2: Project Preparation
Objectives

- What we need for testing the preparation phase
  - Synopsis
  - FA Website > Project Settings
  - FA manual

- The questions we want answered in the preparation phase
  - Do we provide a facilitator the right materials to start a project and prepare the sessions?
  - Does the facilitator understand the provided tools?

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- 'I can start a project and prepare the sessions (incl invitations, etc.).'
- 'I can find answers to the questions I have.'
- 'I understand the tools and know how to use them.'
- 'I feel comfortable to invite the people (incl. OA) and start the sessions!'
- 'I understand how to use the slides and they can help me structure the sessions.'
- 'I understand how to use the analogue tools and how they can help me in the process and how they can stimulate towards better end results.'

Procedure (80 min)

Meet FA testee (face-to-face or online):

1. Introduction (10 min)
   a. Let sign informed consent. Provide informed consent twice (one for keeping, one for project partner). In case of online meeting, informed consent should be sent via mail and returned signed to the investigator (NFE, VIC, AIT)
2. Synopsis (10 min)
   a. Discuss synopsis and ask questions (see protocol template below)
3. Manual (10 min)
   a. Hand over the manual and ask to read it
   b. Discuss manual (see protocol template below)
4. Website (30 min)
   a. Let testee start a project on the website and prepare the first session while he/she shares the screen
   b. Let testee do *Think aloud*, while tester takes notes (see Protocol template below)
      i. Create a new project
      ii. Select a theme and add it to the project
      iii. Add team with OA participants
      iv. Familiarize with Session: Guidelines, Observation Sheets and Power Points Presentation
      v. Prepare presentation
      vi. Prepare analogue tools, print and cut cards (Organize coloured paper, print and cut cards, etc.)
      vii. Prepare booklet and print (Organize coloured paper, etc.)
5. Discuss results with testee (20 min)
   a. Ask questions and make notes of given feedback and how we might improve

Step 3: Sessions
Objective
- Get feedback and testing the **sessions phase**
  o PWA
  o Optional: Analogue Tools (PDF)

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Procedure (40 min)
1. Provide materials and tools needed for a session
   a. Provide credentials and access to PWA
   b. Optional: Analogue tools / session procedure:
2. PWA: Show the testee how to perform the tasks while testee gives feedback doing thinking aloud (30 min)
   a. Onboarding, Home screen and menu
   b. Record new story
   c. Edit (new) story
   d. Edit existing story
   e. Canvas

3. Optional: Analogue tools / session concept and guidelines (10 min)
   a. Present the tools and guidelines
   b. Note comments and impressions from testee

Interview Protocol Template

	Metadata and Testee Demographics	
	Date and time	
	"Live" or via telephone/ Skype/…	
	Tester	
	Participant's name	
	Participant's age	
	Participants occupation	
	Participant´s prior experience with (digital) ST	
	Relevant information participant (Relation between evaluator and participant, education, …)	
1	**Step 1: FA invitation Feedback on Synopsis**	
1.1	What can the HiS platform be used for?	
1.2	What is your purpose (purpose of your client)? What is our motivation to host a project?	
1.3	As a facilitator, what would be your tasks to successfully host a project? What will be your role?	

1.4	As a facilitator how much time / personnel effort would you invest in the project?	
1.5	What would be a promising end result of your project?	
1.6	What was the first impression of the facilitator's synopsis?	
1.7	What was positive in the synopsis?	
1.8	What is missing in the synopsis?	
2	**Step 2: Project preparation Feedback on FA manual**	
2.1	What was the first impression of the facilitator's manual?	
2.2	Does the manual provide the right information and tone to motivate/enthuse the FA testee?	
2.3	Does the manual provide the right information to inform the FA testee about the goal of HiStory? (Story telling, social inclusion, use of tools,..)	
2.4	Did the manual provide the right information to inform you about the tasks of a facilitator/what is expected of him/her? (Tasks, timeline, spent hours,…)	
2.5	What was positive in the manual?	
2.6	What was missing?	

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2.7	Suggestions/questions?	
	Impressions on participant selection and introduction	
2.8	How would you establish your choice of participant? (Based on network of participant, qualities of participant, already worked with him/her, suggested via, …)	
2.9	How would you first contact the participant? (Email, phone call, …)	
2.10	What kind of the provided information would you give the participant with the first contact? (Link to website, documents, …)	
2.11	What would you expect how participant initially respond? (Positive, negative, needed more information,…)	
2.12	What extra information participant would need after the first contact and how? (Not necessary, explanation through phone call, …)	
2.13	What would you hold back from becoming a facilitator? (It takes too much time, it is not paid, …)	
	Feedback on the website	
2.14	What was the first impression of the website?	
2.15	Did the website provide the right information and feel to enthuse a FA testee? (Lay-out, user friendliness,…)	

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2.16	Did the website provide the right information to inform you about the goal of HiStory? (Story telling, social inclusion, use of tools,..)	
2.17	Did the website provide the right information to inform and train you about the tasks of a facilitator? (Prepare meetings, create project, understand tools,…)	
2.18	What was positive about the website?	
2.19	What was missing? Where would you need more information than given on the website?	
2.20	Suggestions/questions?	
3	**Step 3: Sessions Feedback on PWA**	
3.1	Add notes from PWA interaction with think aloud here:	
3.2	What is your first impression of the app?	
3.3	What was positive about the app?	
3.4	What was missing?	
3.5	Suggestions/questions?	
	Feedback on analogue tools	

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3.6	What is your first impression of the analogue tools?	
3.7	What is positive?	
3.8	What is missing / can be improved?	
4	**FA checklist**	
4.1	After having read the documents and learned how to handle the tools as a facilitator	
4.2	'I can start a project and prepare the sessions (incl. invitations, etc.).'	
4.3	'I can find answers to the questions I have.'	
4.4	'I understand the tools and know how to use them.'	
4.5	'I feel comfortable to invite the people (incl. OA) and start the sessions!'	
4.6	'I understand how to use the slides and they can help me structure the sessions.'	
4.7	'I understand how to use the analogue tools and how they can help me in the process and how they can stimulate towards better end results.'	
4.8	Final comments?	

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Partners

Supporting Organisations