



## DELIVERABLE

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### D 4.3 Methodology for evaluation of Discover Platform and the Users Revision: 1.6

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## REVISION HISTORY AND STATEMENT OF ORIGINALITY

### Revision History

Revision	Date	Organisation	Description
#1.0	01 <sup>st</sup> August 2012	AUTH	Report template and draft strategy
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#1.5	8 <sup>th</sup> October 2012	AUTH	Final review
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### Statement of originality:

This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

## Table of Content

REVISION HISTORY AND STATEMENT OF ORIGINALITY	2
TABLE OF CONTENT	3
EXECUTIVE SUMMARY	4
1. INTRODUCTION	5
1.1 AIM	5
1.2 PURPOSE	5
1.3 STRUCTURE	5
1.4 INTENDED AUDIENCE	5
2. EVALUATION PROCESS	6
2.1 OVERALL EVALUATION APPROACH	6
2.2 QUANTITATIVE METHODS	12
2.3 QUALITATIVE METHODS	12
2.4 TIME AND ACTIVITY PLAN	13
2.5 EVALUATION METRICS AND INDICATORS	18
2.6 DESCRIPTION OF MONITORING TOOLS	19
ANNEX A – PILOT PERSONNEL SURVEY	21
ANNEX B – USER SURVEY (FORMAL AND INFORMAL CARERS)	25
ANNEX C - QUESTIONS FOR THOSE USERS THAT DROP OUT OF TRIAL	32
ANNEX D - PILOT MONITORING AND REPORTING TEMPLATES	33
ANNEX E – PILOT PROFILE MONITORING	35

## Executive Summary

For an efficient and effective pilot evaluation and service adaptation, DISCOVER needs to define the evaluation methodology for the platform and service, through its users. Following which, during the pilot phase we will run the evaluation of the platform following the methodology previously developed, in order to adapt the platform accordingly and possibly release a new version.

The validation methodology appraises the wider challenges for technical and organisational feasibility and draws together generically applicable or synthesized findings and the project's intended impact of "improving the digital skills of domiciliary care workers, supporting their:

- communication skills
- self-learning and
- support through accessing DISCOVER learning services

## 1. INTRODUCTION

### 1.1 Aim

To define the appropriate methodology for the validation and evaluation of the DISCOVER platform and service by its users and pilot personnel, in order to highlight the significant impact potential of DISCOVER in four (4) different countries.

### 1.2 Purpose

The purpose of this deliverable is to present the evaluation methodology that will be used to evaluate the DISCOVER platform and service during the pilot phase, in order to adapt the platform accordingly (and possibly release a new version), but also to appraise the wider challenges for technical and organisational feasibility and to draw together generically applicable or synthesized findings.

The methodology will appraise the impact the DISCOVER project has on improving the digital skills of domiciliary care workers supporting communication skills (ability), self-learning and support through accessing DISCOVER learning services.

### 1.3 Structure

This deliverable is structured in three main chapters and a section with Annexes.

Chapter 1: defines the purpose and objectives of this deliverable and the related tasks of the work package, as well as the intended audience that this report will reach.

Chapter 2: describes in detail the overall evaluation plan, as a process that will be followed, with specific methods to be used and a detailed timeline and activity plan that can be used as a guide by the local pilot partners.

Chapter 3: presents in detail the evaluation tools that will be utilised and the evaluation criteria and metrics that will be applied to measure the overall performance and impact of DISCOVER platform and service.

In the Annexes, draft survey questionnaires, and templates for monitoring and evaluating the overall pilot performance are presented.

### 1.4 Intended Audience

This deliverable is aimed to be used internally by the consortium, especially by the personnel that will be involved locally in the pilot execution and intends to be used as a reference document that presents the entire rationale and logic of the DISCOVER evaluation methodology, as well as to be used as a guideline for executing the pilot evaluations.

## 2. Evaluation process

### 2.1 Overall Evaluation Approach

DISCOVER evaluation follows a multi-dimensional approach in order to manage the evaluation of the pilots' performance, application of the DISCOVER platform and service and community impact on improving the digital and learning skills of carers. This multi-dimensional approach will be addressed to those involved directly in the pilots (e.g.: formal and informal carers, pilot personnel) and to those involved indirectly (e.g.: elders and their relatives) and will:

- Measure the **Performance** of the DISCOVER platform and service, through the community (users: carers, older people and their families).
- Utilise specific evaluation **Parameters** for measuring the social impact and the learning and digital skills gained, usability and user acceptance as well as some business and sustainability insights.
- By applying existing **Qualitative and Quantitative methods and tools**, through e.g.: questionnaires, surveys, interviews and observations and where possible triangulating results to optimise their validity.

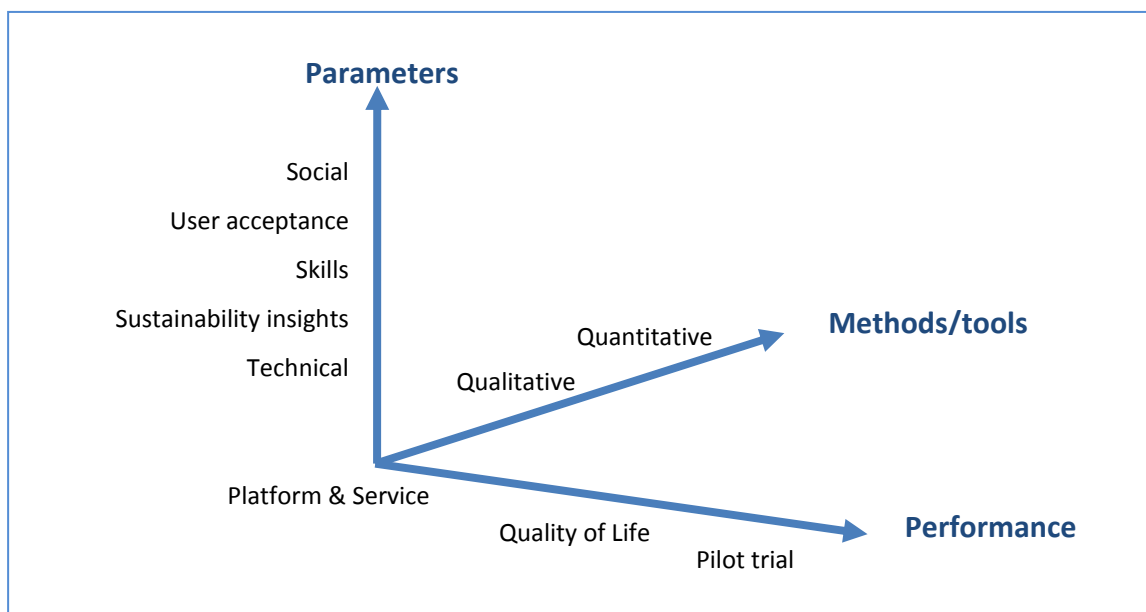


Figure 1: DISCOVER multi-dimensional

Evaluation of the DISCOVER service, will be divided into four (4) distinct areas to ensure comprehensive evaluation of relevant components:

- Social / Impact on the quality of life;
- Skill Development / Acquisition;
- Technical/User acceptance/ Usability
- Sustainability

DISCOVER methodology will evaluate the platform's performance in terms of it:

- Promoting an effective learning environment (skill);
- presenting attractive learning content. (Technical);
- facilitating the use of social networking tools by the users (Skill);
- supporting the use of new communication devices by the users (Skill);
- creating opportunities to access online forums and other networks that may provide a vital lifeline of support to carers (Technical);
- providing wherever possible access to parallel learning opportunities through a variety of channels (web, mobile IPTV) (Technical);
- presenting user friendly and accessible and flexible learning opportunities; (Technical).
- responding to informal carers' need for information, advice and guidance and support (social impact);
- improving carers' digital competency that will improve the quality of life and social inclusion of both carers and the people they care for (Skill);
- facilitating the social support of formal and informal home carers that may suffer from isolation and loneliness in their caring role (social impact);
- enabling the 'cared for' older people to benefit from digital skills training through buddying with their carer to learn skills together or learning skills from their carer (Skill);
- promoting the ability of older people to help themselves, by using on their own the digital learning services, where possible, thus lessening the burden of the carer (Skill);
- providing access to accredited and/or certified courses and flexibility to learn at a time convenient for informal and younger carers (18-24) in order to manage their further education part time, providing them with digital skills for self-learning and self-help (social impact);

The Pilots' performance in respect to the above parameters, will be evaluated against project objectives and targets. Monitoring tools will be used and the current status will be reported through a profiling template that will be updated during the running of the pilots. It will include the number of users at residential homes or care centres that are involved in the pilots, means of delivery of DISCOVER training service, lessons learnt and added value that each pilot brings to the project.

Evaluation methods are usually grouped into two basic categories – quantitative and qualitative, in relation to the type of “data” they produce. In general, quantitative methods produce “statistics” while qualitative methods capture more descriptive data. In DISCOVER we will try combining quantitative and qualitative techniques, as a “mixed” evaluation method, to produce a richer, more comprehensive understanding of the project's results. DISCOVER evaluation will collect, combine and analyse both qualitative (contextual) and quantitative (numbers) data, as planned in the table below, in order to better understand the project performance and the overall system acceptance and at the same time to develop insights into DISCOVER's sustainability.

As each pilot test-bed site is bringing its own unique perspective a range of evaluation methods will be used (Table1).

The evaluation methods compulsory for all test bed sites are:

- Focus groups to determine carers' needs
- Impact evaluation questionnaires with carers and the people they care for
- Usability evaluation questionnaires with carers and the people they care for
- Semi-structured Interviews with a subset of carers and the people they care for
- Assessment quizzes embedded in the modules (computer generated and analysed)
- User Interaction Data (computer recorded)
- Pilot monitoring, system log files and technical supporting files (computer generated and analysed)



**Table 1: DISCOVER Qualitative and Quantitative evaluation methods**

Tools	Description	Data generated
Assessment quizzes (as described in the User methodology handbook)	Tests administered to users before and after each DISCOVER module to determine the level of acquisition of specific knowledge and skills.	quantitative
Questionnaires a) Impact evaluation questionnaire b) Pilot personnel questionnaire c) Usability questionnaire	Series of questions that generate information or opinions in a numerical form to be analyzed (quantitative) or that that generate information or opinions in a contextual form (qualitative)	Quantitative and qualitative
Existing data and statistics	Existing figures and statistics on the demographics and their digital skills and abilities. Information from databases, articles and books already published.	Quantitative and qualitative
User Interactions data	Measures of users competences through performance of particular tasks that are computer recorded as users work through the modules. E.g. completion data generated by MOODLE for SCORM compliant learning objects, Mediasite analytics reflecting access to resources and level of resource exploration.	quantitative
System log files	Monitoring tools that reflect technical performance of the overall system e.g. server load statistics, bandwidth usage statistics, ping time information.	quantitative
Interviews	Semi-structured questioning, using an interview guide, with the carer and the cared-for person, either together or separately as they prefer. E.g.: walkthroughs of the system to identify usability issues.	qualitative
Focus groups	Guided discussions using a focus group schedule of questions	qualitative
Internal Audit	Checklists, a summary report on subjective observations of the pilot will be made by the staff member	qualitative
Group observations (optional)	Quantitatively focused observations that involve “scoring” or coding users interactions	qualitative

## Optional evaluation methods

- Questionnaires with personnel assisting delivery of DISCOVER in test bed sites
- Group discussions
- Group observations
- Internal audit

In order to measure the improvement of the social aspects of the users, the digital skills gained, usability and user acceptance, some business and sustainability insights and the technological characteristics of the DISCOVER platform and service, specific evaluation indicators are specified.

**Table 2: DISCOVER evaluation parameters**

Parameters	Metric	Purpose	Indicator	Method	Work package
<b>Social</b>	<ul style="list-style-type: none"> <li>▸ Improved social inclusion</li> <li>▸ Social life improvement</li> <li>▸ Enrich means of communications</li> <li>▸ Quality of life Improved</li> </ul>	Measure : <ul style="list-style-type: none"> <li>▸ the improvement of their social integration</li> <li>▸ improvement in accessing information reducing stress and isolation I</li> <li>▸ improved confidence in new technologies</li> </ul>	I. Feeling of stress II. Level of isolation III. Access to information IV. Satisfaction V. Enriched means of communication	Impact Questionnaires/ Interviews	WP2 impact evaluation
<b>User acceptance/ Usability of DISCOVER platform</b>	<ul style="list-style-type: none"> <li>▸ User Friendly</li> <li>▸ Easy to learn</li> <li>▸ Easy to use</li> <li>▸ Easy to personalise</li> <li>▸ Helpful environment</li> <li>▸ Ease of access to learning resources</li> </ul>	Measure the subjective satisfaction when using the platform and the service and the accessibility in a variety of channels	I. Level of ease of use II. Level of ease to learn how to use it III. Visual appeal of the images, colours and fonts on the screen IV.	Registration and completion of courses usability questionnaires, Personnel questionnaires, impact questionnaires and interviews; group observation	WP2 impact evaluation WP3 interactive testing WP4 service evaluation
<b>Skills Improvement</b>	<ul style="list-style-type: none"> <li>▸ Improved digital competences of carers</li> <li>▸ Improved digitally-supported professional skills</li> <li>▸ Improved caring skills</li> <li>▸ Strengthened use of ICT solutions for social care and support by informal carers</li> </ul>	Measure : <ul style="list-style-type: none"> <li>▸ The improvement in responding to informal carers need for information, advice, guidance and support.</li> <li>▸ The improvement of carers digital competency</li> <li>▸ The improvement of carers skills in caring for older people</li> </ul>	I. No. of participants with improved digital competences II. No. of professional carers using new digital technologies in day to day practice III. No. of carers with a positive attitude towards technology	Focus groups: Skills audit to assess current skills and technology usage; Focus groups Assessment quizzes; impact questionnaires	WP2 impact evaluation WP4 service evaluation

Parameters	Metric	Purpose	Indicator	Method	Work package
<b>Sustainability insights</b>	<ul style="list-style-type: none"> <li>▸ Worth paying for</li> <li>▸ Reasonable price</li> <li>▸ Who will pay</li> </ul>	Measure the willingness to: <ul style="list-style-type: none"> <li>▸ pay for the service(s)</li> <li>▸ to continue using the system</li> <li>▸ to recommend to other people</li> </ul>	No. of participants: <ol style="list-style-type: none"> <li>I. Willing to pay for the service</li> <li>II. Recommend to family and friends</li> <li>I. Willing to continue using it</li> </ol>	usability questionnaires, personnel questionnaires	WP4 service evaluation WP5
<b>Technical</b>	<ul style="list-style-type: none"> <li>▸ Demonstrable technical feasibility of the service</li> <li>▸ Established training courses in Digital Technologies</li> <li>▸ Interoperability with local systems offering training courses</li> </ul>	<ul style="list-style-type: none"> <li>▸ Deployment of technical solution at national and European level in four testbed sites</li> <li>▸ 5 Moodle courses and 9 VCC 2.0 simulation courses</li> </ul>	<ol style="list-style-type: none"> <li>I. Testbed evaluation</li> <li>II. No. of informal carer participants take up courses</li> <li>III. No of Courses released</li> <li>IV. No of users registered</li> </ol>	Pilot monitoring, System log files Technical support log files	WP4 service evaluation

## 2.2 Quantitative Methods

DISCOVER quantitative method involves numerical data compiled arithmetically and analyzed by statistical processes. Several tools like assessment quizzes, questionnaires, existing data and statistics, performance-based assessments and system log files are being used during the test bed pilots that will generate easily quantifiable answers.

Questionnaires will consist of a series of questions that generate information or opinions in a numerical form to be analysed and will be applied to most of the trial participants and the pilot personnel (operational, trainers, etc.) either face-to-face in all the local pilot sites or through a dedicated Webpage over the Internet.

Customised engagement methodologies will be utilised for the three specific target groups identified below:

- the informal and formal carers, involved in the pilot phase that have used the DISCOVER platform extensively (evaluation questionnaires: for informal carers and formal carers (under development); semi structured interviews: (under development), usability questionnaire annex B),
- the pilot personnel, that have supported the local the pilot phase, trained and help users in everyday problems (personnel questionnaires: annex A),
- the older people and their families who are receiving care from the carers participating in DISCOVER and can really compare the care they receive before and after their carer's use of the DISCOVER service (evaluation questionnaires: (under development) semi structured interviews: (under development);

The structured questionnaires have been prepared (Annexes A-C) and will be customised to the different languages of the users and will be slightly modified to accommodate specific questions related to the local pilots (where needed) and will be revised and improved as the project progresses.

Quantitative data collected will be consistent, reliable and easy to analyse. The findings may be generalizable, as the carers in the pilot will be selected to representative of carers in their country. NOTE: We will be applying questionnaires to the full population of participants.

## 2.3 Qualitative Methods

DISCOVER will combine the quantitative with qualitative methods, especially from information gathering from interviews and observations that require analysis through interpretation and inference. Local pilots will have to interact internally through discussion, interviews and observations, periodically with the local focus groups (carers -formal and informal and elders with their families) formed at each of the pilots' sites and spend time with them, eliciting their thoughts and opinions either directly (the carers) or indirectly (elders responsible or their families).

With the qualitative methods we can interpret the meanings that people assign to their requests and demands, on the basis of their everyday life needs, providing more detailed information to explain complex issues.

Meetings have already taken place with carers and end-users to explain the benefits of the DISCOVER project and the associated pilots and obtain their consent for potential participation.

## 2.4 Time and activity plan

The pilots' will be conducted throughout a 14 month period and will be of a . This period has been divided into two distinct phases (Phase 1 and Phase 2). Each phase will have its own characteristics and activities and after its ending a two month proper evaluation of the service will follow.

**Phase 1 (6 months long- M14-M19):** Provides us with an opportunity to trial course materials, receive feedback on this and make amendments/refinements based on feedback. It will provide with early evaluation data and the opportunity to test the data collection tools, guides, general support and facilitation mechanisms. It will allow to train and consolidate the skills and knowledge required in the trainers and facilitators that are involved in the pilots execution. Phase

**Phase 2 (8 months long- M20-M27):** During this phase a more complete and refined suite of resources will be available to the pilot sites. It is during this phase that we will be targeting a population of carers for our summative, impact evaluation. There will be space for the first two months for adding new content and improving the service according to the feedback received and the findings of phase 1.

Notice: From M20-21, there will be an analysis of the feedback and possible improvement of the system, services and content enrichment and campaign to attract more users.

Pilot evaluation progress, strongly depends on the execution of the pilots and the pilot users engagement in the process and provides valuable input for the pilot's sustainability plan. Following the evaluation process the following time plan is designed.

	Evaluation process	Time required
1	<u>Further Focus Groups; establish carers' needs</u>	<u>Duration</u> 4 months total <u>Timeplan</u> M6-12
2	<u>Preparation - Briefing</u>  Personnel that will be supporting the pilots will be briefed on the purpose and aims of the evaluation. They will then be asked to comment on the evaluation process and especially on the questionnaires already provided.	<u>Duration</u> 2 month total  <u>Timeplan</u> First 2 months after the start of the pilot phase 1 (Months 14-15).
3	Complete the first (M14-19) and second phase (M20-27) of the pilot. Metrics that will be collected, through the following means:  First phase <ul style="list-style-type: none"> <li>• Pilot personnel: /personnel questionnaire (annex A)</li> <li>• Pilot users, who have withdrawn from the project: impact questionnaires (annexes under development)</li> <li>• Pilot users who have withdrawn from the project: usability questionnaires (annexes C)</li> <li>• Interviews with carers and the older people they care for, who have withdrawn from the project (annex under development)</li> </ul> Second phas <ul style="list-style-type: none"> <li>• Pilot personnel: /personnel questionnaire (annex A)</li> <li>• Pilot users: impact questionnaires (annexes under development)</li> <li>• Pilot users: usability questionnaires (annex B)</li> <li>• Interviews with carers and the older people they care for (annex under development)</li> </ul> Details about these metrics, how they are collected, and their purpose in understanding the achievement of DISCOVER objectives is described in the next chapter.	<u>Duration</u> Pilot period - 14 months

4	<p><u>Continued evaluation of the pilot performance</u></p> <ul style="list-style-type: none"> <li>• Technical Call Log Statistics</li> <li>• System Log Files</li> <li>• Internal Audit</li> <li>• Update Pilot profiling</li> </ul> <p>All actionable tasks are addressed and reported back to the consortium with specific instructions for any process or technical changes</p>	<p><u>Duration</u> Pilot period – 14 months.</p> <p><u>Timeplan</u> Continues with the pilot execution</p>
5	<p><u>Reporting</u></p> <p>Pilot partner report the pilot performance together with the users’ evaluation results. The completed evaluation document is distributed to all DISCOVER consortium partners.</p>	<p><u>Duration</u> Pilot period – 2 months.</p>
6	<p><u>Conclusions</u></p> <p>A teleconference or meeting to evaluate the results and determine whether any modifications to the pilot need to be made before the next phase and after the final phase.</p>	<p>Within 2 days after review is complete</p>

Impact evaluations and learning assessments will be coordinated in liaison with WP2 regarding user engagement.

**Figure 2: Activities undertaken during the Prepilot phase**

Project month	6	7	8	9	10	11	12
Activity							
<b>Prepilot Phase</b>							
Privacy Impact Assessment & Ethical checklist							
Focus groups – carers’ needs							
DISCOVER CONTENT –Initial Specification							
DISCOVER CONTENT – development and specification updates							
DISCOVER – initial Technical specification							
DISCOVER - Technical specification updating							
Iterative testing of DISCOVER materials							



**Figure 3: Activities undertaken during Pilot phases 1 and 2.**

Project month	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
Activity																			
<b>Release of First DISCOVER Courses</b>																			
<b>Piloting Phase</b>			<b>Phase 1</b>						<b>Phase 2</b>										
<b>Evaluation</b>																			
Focus groups trialling content and questionnaires																			
Preparation - Briefing																			
Pilot Staff Questionnaires, User questionnaires and Interviews																			
Support Call Logs, System log files, Internal audits Assessment quizzes																			
Reporting																			
Conclusions																			

## 2.5 Evaluation metrics and indicators

Performance	Parameters	Indicator	Metric	Method	Measurement formula and computation
Social / Impact on the quality of life	a. Social	I. Feeling of stress II. Level of isolation III. Access to information IV. Satisfaction V. Enriched means of communication	<ul style="list-style-type: none"> <li>▸ improved social inclusion</li> <li>▸ Social life improvement</li> <li>▸ Enrich means of communications</li> <li>▸ Quality of life Improved</li> </ul>	Questionnaires/ Interviews	Positive answers. Set levels of positive answers to drive to a conclusion
	b. Skills improvement	IV. No of participants with improved digital competences V. No of professional carers using new digital technologies in day to day practice VI. No. of carers with a positive attitude towards technology	<ul style="list-style-type: none"> <li>▸ Improved digital competences of carers</li> <li>▸ Improved digitally-supported professional skills</li> <li>▸ Improve skills of carers</li> <li>▸ Strengthened use of ICT solutions for social care and support by informal carers</li> </ul>	Skills audit to assess current skills and technology usage; User questionnaires and interviews, group	
Platform and Service	a. Sustainability insights	No of participants: III. Willing to pay for the service IV. Recommend to family and friends V. Willing to continue using it	<ul style="list-style-type: none"> <li>▸ Worth paying</li> <li>▸ Reasonable price</li> <li>▸ Who will pay</li> </ul>	User questionnaires and interviews, group Personnel questionnaires	Ratio on question one of this section
	b. User acceptance/Usability	I. Level of easiness of use II. Level of easiness to learn how to use it III. Visual appeal of the images, colours and fonts on the screen IV. Improved confidence in new technologies	<ul style="list-style-type: none"> <li>▸ User Friendly</li> <li>▸ Easy to learn</li> <li>▸ Easy to use</li> <li>▸ Easy to personalise</li> <li>▸ Helpful environment</li> <li>▸ Ease of access to learning resources</li> </ul>	Registration and completion of courses interviews; questionnaires; group observation Personnel questionnaires	Positive answers to the questionnaire Set levels of positive answers to drive to a conclusion
	c. Technical	I. Testbed evaluation II. No of informal carers participants take up courses III. No of Courses released IV. No of users registered	<ul style="list-style-type: none"> <li>▸ Demonstrable technical feasibility of the service</li> <li>▸ Established training courses in Digital Technologies</li> <li>▸ Interoperability with local systems offering training courses</li> </ul>	Pilot monitoring, System log files Technical support log files	

## 2.6 Description of monitoring tools

The pilot performance will be thoroughly examined not only on the basis of technological accuracy and effectiveness, but via a holistic test of every aspect of the solution. The measurement tools that will support the determination of success in achieving the goals of the DISCOVER pilot studies include:

- **Bespoke Pre-Pilot Feedback Gathering:** During the Pre-Pilot phase M6-M12 information related to technical performance and usability will be gained from DISCOVER partner colleagues, carers and carer trainers, where opportunities present. This range of activities will allow DISCOVER to gain feedback on discrete components of DISCOVER learning as they are developed and respond to these prior to the first pilot phase. i.e. the development team can adopt a rapid prototyping approach to content development. For example feedback on performance on the DISCOVER website can be gained, followed by feedback on performance of DISCOVER MOODLE interactivity, and the performance of video streaming and mobile content etc... The questions, presented as quizzes in MOODLE, used to gather information about discrete components of the DISCOVER platform will vary according to the component being evaluated. As specific and bespoke tools are created these will be added to this document.
- **Pilot Personnel Questionnaires:** A first survey will be completed at the end of the first 6 months of the pilot phase, to identify any weaknesses in the training and documentation during the installation of the pilot system; as well as the ease of installation and operation of the pilot system. A second survey will be completed at the end of the pilot phase to identify any operational issues associated with the DISCOVER system.
- **Usability Questionnaires:** At the end of pilot phase 2, the users (formal and informal carers) will be consulted on a range of issues, related to design, ease-of-use, satisfaction with results, pricing, accessibility, etc. In addition to the questionnaires of the users themselves, questionnaires will also be completed with the person being cared for (if they engaged directly with the DISCOVER platform) to obtain their perspectives. All carers who withdraw early from the project, and the people they care for (only if they engaged directly with the DISCOVER platform), will be asked to complete the relevant user questionnaires.
- **Impact evaluation questionnaires: At recruitment, and again at the end of pilot phase 2, carers (both formal and informal) 2,** and the people they care for will be consulted via questionnaires regarding improvement in their skills and their quality of life. In addition a subset of Carers and the person they care for, per test-bed country will be asked to participant in semi-structured interviews. All carers who withdraw early from the project, and the people they care for, will be asked to complete the relevant questionnaires and, if they were interviewed at recruitment to participate in a semi structured exit interview.
- **Technical Call Log Statistics:** All technical and scientific support calls from the pilot users and also the pilot personnel will be logged, during the pilot phase, and on an overall basis for the entire DISCOVER project, statistics will be provided as indicators of the technical accuracy and effectiveness of the DISCOVER service, effectiveness of the training programme and documentation, as well as whether issues required escalation beyond the first level of support either on the basis of timeliness of responses or technical knowledge of the support staff.

- 
- **System Log Files:** System log files will be gathered at the conclusion of the first six months and at the end of the pilot phase (and collectively over the entire period of all pilots) to identify technical or other issues that arose during the course of the pilot.
  - **Pilot Monitoring/ Internal Audit:** Audit checklists from each pilot site will provide input to an overall report on the internal audit. In addition to these checklists, a summary report on subjective observations of the pilot will be made by the staff member providing audit services.
  - **Pilot Profile Monitoring:** The Pilot trials will be evaluated according to their performance of accomplishing the general objectives and targets of the project. A monitoring tool will be used and current status will be reported through a profiling template that will be updated during the running of the pilots (ANNEX E). It will include the number of users in residential homes or care centres involved in the pilots, means of delivery of DISCOVER training service, lessons learnt and the added value that each pilot brings to the project. Assessment quizzes: These quizzes completed by users before and after each module aim to determine the level of acquisition of specific knowledge and skills.

## Annex A – Pilot personnel survey

(This part will be filled in by the interviewer)

<b>Progressive Number Questionnaire:</b>	
<b>Country:</b>	
<b>Pilot:</b>	
<b>Date (dd/mm/yyyy)</b>	

We would greatly appreciate your feedback and kindly ask you to complete this questionnaire. The answers you provide will allow us to understand if the DISCOVER service was useful, easy to use and provided a satisfactory service.

**Statement of Privacy:** *The information provided will be kept completely confidential and participants' identity will remain anonymous.*

### Personal Information

Respondent's role in trials:

### Section 1: Usability Evaluation

(Please **circle** the number that best fits your opinion)

#### 1. In your opinion, was DISCOVER easy to use?

1	2	3	4	5
Very difficult	Difficult	Neither easy nor difficult	Easy	Very easy

#### 2. Were the instructions given by the computer clear and understandable and easy to follow?

1	2	3	4	5
Not at all	A little	Not very much	Yes they were clear and understandable	Very clear and understandable

#### 3. Was it difficult for the participants to use the DISCOVER without your help?

1	2	3	4	5
Very difficult	Difficult	Neither easy nor difficult	Easy	Very easy

**4. Approximately how many days of practice with DISCOVER did it take you to learn how to use DISCOVER?**

(Please write an approximate number of days) \_\_\_\_\_ days

**5. Do you believe that one tutor / trainer was enough during the first trials to teach the participants how to use DISCOVER?**

1	2	3	4	5	6
No (for both physical & mental)	No (for physical)	No (for mental)	Yes (for physical)	Yes (for mental)	Yes (for both physical & mental)

**6. Were the design colours and images presented on screen visually appealing?**

YES                      NO

**7. Would you characterise the DISCOVER system as warm and friendly or cold and technical?**

WARM & FRIENDLY                      COLD & TECHNICAL

**8. How beneficial do you believe DISCOVER is?**

1	2	3	4	5
Not at all beneficial	Not very beneficial	Neither beneficial nor harming	Beneficial	Very beneficial

**9. Please write any suggestions you want to make on how to make these programs more appealing for the users.**

**SUGGESTIONS:**

*[comment: change the text, please write below any explanation why felt something was difficult etc] – e.g. understand what is difficult about technology*

**Section 2: Learning skills**

**1. DISCOVER improved the ability of the trial participants to use digital technologies**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**2. DISCOVER improved the trial participants learning skills in caring for older people**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**3. DISCOVER has met my expectations.**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**Section 3: Sustainability insights**

*(please tick the answer that fits your opinion best)*

1	Do you think DISCOVER is worth paying for?	YES	NO
2	If Yes, how much would be reasonable according to your opinion?		
	Please specify		
3	Would you recommend DISCOVER to other people (relatives/friends)?	YES	NO

**Section 4: Open-ended questions**

**1. According to the experience you now have with DISCOVER can you describe the drawbacks (if any) which would discourage someone from subscribing/purchasing it?**

<p><b>Drawbacks:</b></p> <p>1.</p> <p>2.</p> <p>3.</p>
--

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**2. As a trial attendant, did you come across particular difficulties in training the participants? If yes, could you describe them?**

**Difficulties:**

**1.**

**2.**

**3.**

**3. What suggestions would you want to make to improve DISCOVER service for the users?**

**Suggestions:**

**1.**

**2.**

**3.**

**4.**



## Annex B – User survey (Formal and informal Carers)

(This table will be filled by the interviewer)

<b>Progressive Number Questionnaire:</b>	
<b>Country:</b>	
<b>Pilot:</b>	
<b>Date (dd/mm/yyyy)</b>	

We would greatly appreciate your feedback and kindly ask you to complete this questionnaire. The answers you provide will allow us to understand if the DISCOVER service was useful, easy to use and provided a satisfactory service.

DISCOVER refers to the digital training service for caring for elder people that you have been using.

**Statement of Privacy:** *The information provided will be kept completely confidential and participants' identity will remain anonymous.*

### User Profiling - Personal Information

<b>Your Name:</b>	Optional	
<b>Your Gender:</b>	Male: <input type="checkbox"/>	Female: <input type="checkbox"/>
<b>Your Age:</b>	<input type="checkbox"/> 18 to 30 <input type="checkbox"/> 31 to 44 <input type="checkbox"/> 45 to 54 <input type="checkbox"/> 55 + over	

<b>Education:</b>					
<input type="checkbox"/>	No School at all	<input type="checkbox"/>	Primary School	<input type="checkbox"/>	Secondary School
<input type="checkbox"/>	Higher education (e.g., university, college)		<input type="checkbox"/>	Other	
<b>Comments</b>					

<b>Do you have any formal education or training in caring for older people?</b>	<b>No</b>	<b>Yes</b>
If yes, please specify:		

	<b>No</b>	<b>Yes</b>
<b>Are you currently providing care services for elders?</b>		
If No:		
<b>Are you interested to learn how?</b>		
<b>Have you provided care services for elders in the past?</b>		

If yes: <b>Where are you providing them?</b>		
At home?		
At a Residential Care Home?		
At a Day Care Centre?		
Other: Please describe in the space below:		
<b>Do you consider yourself a professional Carer?</b>		

**How often do you use the following?**

	Almost every day	At least once a week	At least once a month	Never
Personal Computer				
Smart phone				
Tablet PC				
Smart TV				
Internet connection				

	No	Yes
<b>Have you ever used a digital learning/training service?</b>		
If yes can you write a sentence about it?		

**Section 1: Social Evaluation of DISCOVER:**

Below there are some emotions listed regarding the way you are **feeling right now** about the DISCOVER training service you have been using.

**Please tick the box with the number corresponding to the statement that best describes how you are feeling RIGHT NOW about the physical and mental training you have been doing!**

*You do not have to think about your answers too much. Remember: There are no right or wrong answers. Just your opinion!*

	1 Strongly Disagree	2 Disagree	3 Neither Agree Nor Disagree	4 Agree	5 Strongly Agree
1. DISCOVER enables me to enrich my means of communication					
2. DISCOVER makes me feel more in control (autonomous)					

3. DISCOVER improved my social life					
DISCOVER reduced my stress and isolation					
4. DISCOVER improved my access to information and knowledge on caring services for elders					

## **Section 2: User Acceptance/Usability Evaluation**

*(Please **circle** the number that best fits your opinion)*

### **1. In your opinion, was DISCOVER easy to use?**

1	2	3	4	5
Very difficult	Difficult	Neither easy nor difficult	Easy	Very easy

### **2. Were the instructions given by the computer clear and understandable and easy to follow?**

1	2	3	4	5
Not at all	A little	Not very much	Yes they were clear and understandable	Very clear and understandable

### **3. Were the letters on the screen easy to read (size and type of fonts)?**

1	2	3	4	5
Very hard	Hard	Neither hard nor easy	Easy	Very easy

### **4. Was DISCOVER difficult to learn how to use?**

1	2	3	4	5
Very difficult	Difficult	Neither easy nor difficult	Easy	Very easy

**5. Was it difficult for you to use DISCOVER without help?**

1	2	3	4	5
Very difficult	Difficult	Neither easy nor difficult	Easy	Very easy

**6. Approximately how many days of practice with DISCOVER did it take you to learn how to use it without help?**

(Please write an approximate number of days) \_\_\_\_\_ days

**7. Were the design colours and images presented on screen visually appealing?**

YES                      NO

**8. Would you characterise the DISCOVER system as warm and friendly or cold and technical?**

WARM & FRIENDLY                      COLD & TECHNICAL

**9. In the box below please write any suggestions you want to make on how to make DISCOVER more user friendly.**

SUGGESTIONS:
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**10. How beneficial do you believe is DISCOVER for you?**

1	2	3	4	5
Not at all beneficial	Not very beneficial	Neither beneficial nor harming	Beneficial	Very beneficial

**11. Did DISCOVER make you feel confident about using new technologies?**

1	2	3	4	5
Not at all confident	A little confident	Neutral	Confident	Very confident

**12. I enjoyed my sessions with DISCOVER.**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**13. I prefer spending my time by doing something else than using DISCOVER**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**14. Using DISCOVER was boring and did not interest me.**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**15. DISCOVER has met my expectations.**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**Section 3: Learning skills**

**1. DISCOVER has improved my ability to use digital technologies**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**2. DISCOVER has improved my skills in caring**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**3. DISCOVER helped me to combine improving my skills in using digital technologies with improving my caring skills**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**4. DISCOVER has helped me to use new digital technologies in my role as a professional carer**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**5. I valued the certification and accreditation information DISCOVER provided.**

1	2	3	4	5
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree

**Section 4: Sustainability Insights**

*(Please tick the answer that fits your opinion best)*

1	Do you think the Courses / Learning Materials within DISCOVER are worth paying for?	YES	NO
2	Would you be *willing/able to pay for the DISCOVER Courses/Learning Materials yourself? <b>*delete if not applicable</b>	YES	NO
3	If not but you wanted to purchase the DISCOVER Courses/Learning Materials, who do you think should pay for them?		
	<input type="checkbox"/> My family <input type="checkbox"/> My Local Council <input type="checkbox"/> Other Please specify		

**4. Do you wish to continue using DISCOVER even after your participation in this project has ended?**  
*(Please circle the answer that fits your opinion best)*

YES                      NO

**5. Would you recommend DISCOVER to other people (relatives/friends)?**

YES                      NO

---

6. Did you talk about DISCOVER with your relatives and/or friends?

YES

NO

7. Whom would you ask if you wanted to purchase DISCOVER (e.g. family member, friend, other)?

Please specify:

**Open-ended questions:**

1. In general, can you describe the benefits (if any) you have gained from using DISCOVER?

BENEFITS:

2. According to the experience you now have with DISCOVER can you describe the drawbacks (if any) of DISCOVER which would discourage someone from paying for the training service?

DRAWBACKS:

## ANNEX C - Questions for those users that drop out of trial

This questionnaire will be available online in the first instance but will be completed by the interviewer / test-bed manager either face2face or via a telephone interview.

<b>Progressive Number Questionnaire:</b>	
<b>Country:</b>	
<b>Pilot:</b>	
<b>Date (dd/mm/yyyy)</b>	

We would greatly appreciate your feedback and kindly ask you to provide responses to this questionnaire. The answers you provide will allow us to understand if the DISCOVER service was useful, easy to use and provided a satisfactory service.

DISCOVER refers to the digital training service for caring for elder people that you have been using.

**Statement of Privacy:** *The information provided will be kept completely confidential and participants' identity will remain anonymous.*

**Please answer either question 1 or 2 and then move onto question 3.**

1	You have tried the DISCOVER services but you stopped using them. Can you tell us the main reasons why?
	<input type="checkbox"/> You prefer to spend your time doing something else <input type="checkbox"/> It does not interest you <input type="checkbox"/> You did not find any information of interest to you <input type="checkbox"/> You are not able to use it <input type="checkbox"/> It is too complicated <input type="checkbox"/> Other (please, specify): <p style="text-align: right;"><b>Please move onto Question 3</b></p>
2	You did not try to use DISCOVER service after the initial training. Can you tell us the main reasons why?
	<input type="checkbox"/> You prefer to spend your time doing something else <input type="checkbox"/> It does not interest you <input type="checkbox"/> You did not find any information of interest to you <input type="checkbox"/> You are not able to use it <input type="checkbox"/> It is too complicated <input type="checkbox"/> Other (please, specify): <p style="text-align: right;"><b>Please move onto Question 3</b></p>
3	What kind of help would you like to receive in the future?



## ANNEX D - Pilot Monitoring and Reporting templates

### Pilot Information

Date and places that DISCOVER services are running

Installation Summary:

Installation Type	# of installations	# of terminals
Day Care Centres		
Home		
Residential Care Home		
other		
<b>TOTALS</b>		

Average system setup time :

Participant Summary:

Pilot Partner	Total # screened for pilot	Total # excluded from pilot	Total # participating at start	Total dropouts	Participants that completed this pilot phase
<b>TOTALS</b>					

Dropout rate:

Total at start =

Total dropped out =

→ total dropout percentage =

Most common dropout reasons:

- Prefer to spend their time doing something else (%)
- Training is not of interest to them (%)
- Did not find any information of interest to them (%)
- Participant was not able to use DISCOVER (%)
- Training was too complicated (%)
- Participant personal issues (%)

Most common reason for scientific or technical support:

Reported Technical Issues by Component (please add a table for each component)

<b>Problem</b>	<b>Component</b>	<b>Priority (1=high 3=low)</b>	<b>Possible causes</b>	<b>Recommended solution</b>

\*Specific cause or solution not determined. Problem occurred randomly.

Additional Issues List

## ANNEX E – Pilot profile monitoring

Inclusion Criteria	Description
Age Type of Carer Knowledge in using ICT technologies Practice caring at home or at a care center	Formal or informal

Means of offering DISCOVER Services	Description
DTV PC Mobile Tablet PC	

DISCOVER services offered	Description

SUSTAINABILITY	Description
<p><b>Involvement: pilot partner involvement in sustainability tasks:</b>  as a potential reseller  as a potential customer  providing information for the other partners</p> <p><b>Readiness : pilot partner readiness to work on sustainability :</b>  DISCOVER relevancy towards the market and the needs : from 0 to 100%  Contacts for sustainability already started : yes / no  Current chances for sustainability : from 0 to 100%</p>	

Lessons learnt
On gaining confidence of the Carer On additional user requirements On service and platform improvements On the actual target market On the sustainable business model On the Pricing model On the local competences needs on digital skills

Added Value	
Business model Users profile Special contacts and progress with the Network E-services Networking Evaluation methodology	Best practice business model Any special user profile Special channels and technology used Additional services used