



The SCAN Foundation Technology Summit: **Enhancing Social Action for Older Adults through Technology**

Expert Panel Report



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Foreword on the Technology Summit Expert Panel Event: Enhancing Social Action for Older Adults Through Technology

This report is a summary of **The SCAN Foundation Technology Summit: Enhancing Social Action for Older Adults through Technology**, which took place on May 5, 2010 in Oakland, California. The purpose of the Technology Summit was to discuss the strategic role of information and communications technology to enhance social action and advocacy for older adults. This event was organized by the Center for Technology and Aging, a grantee organization of The SCAN Foundation that is devoted to the diffusion of technology to help older adults live independently. The Technology Summit convened a panel of experts in the fields of technology, aging services, and social action to identify the best ways for technology to facilitate social action for older adults, strategies for the implementation of technology in conducting advocacy, examples of successful technology applications for social action, and emerging trends in the area.

Dr. Bruce Chernof, The SCAN Foundation President and CEO, set the context for the panel discussion in his opening remarks by introducing The SCAN Foundation and their goals for the Technology Summit. In particular, Dr. Chernof discussed The SCAN Foundation's initiative, which will support the development of a social movement focused on engaging older adults and their caregivers in social action at a community, county, or statewide level. As part of this initiative, The SCAN Foundation is identifying how technology can promote social action, and how organizations can use technology to engage their volunteers, members, older adults, and caregivers. Dr. Chernof stressed that older adults, particularly the vulnerable and frail, are at a disadvantage relative to other groups when it comes to grassroots organizing and having a strong and robust voice that brings awareness to their issues.

Dr. Chernof indicated that the goal of this initiative is to support ways in which technology can be an enabler in building competencies, strengthening and expanding capacity, and scaling programs that give a voice and face to issues confronting older adults and their caregivers. Furthermore, technology offers opportunities to overcome both important diversity challenges (particularly in California), as well as traditional barriers that perpetuate service and policy biases for older adults and their caregivers. Technology can make information more easily accessible, through reaching and engaging a more diverse ethnic and geographic audience in a broader advocacy process.

Dr. Chernof also cautioned that although the "Silent Generation" (those aged 64-72, Pew 2009) may be more challenged than other generations with respect to their mobility and agility, it would be wrong to think of them as silent. In addition, although the "Silent Generation" and a segment of the Older Boomers (those aged 55-63, Pew 2009) are the primary focus of the panel and initiative, Dr. Chernof advised the panel to think broadly about the target audience in terms of the opportunity to engage their children and grandchildren in a broader advocacy process. In

closing, Dr. Chernof challenged the panel to think about technology in a disruptive manner, in terms of the tools and techniques that are available now but perhaps not being currently thought of in an advocacy context. In particular, how can those tools and techniques be used to give voice, be inclusive, and have a broad and sustained impact on the legislative process?

This report contains a summary of the panel content, opportunity areas for The SCAN Foundation, and five case studies on successful use of technology for social action.



Panelists (L to R): Tyrone Grandison, Cecili Thompson Williams, Evonne Heyning, Rey Muradaz, Paola Tonelli, Richard Adler

Executive Summary

As the information and communications technology landscape continues its rapid expansion and evolution, the use of social media technology for social action represents an exciting opportunity. This is particularly true for older adults, a population that has traditionally lacked the strong voice and grassroots organizing that now technology can help facilitate. At The SCAN Foundation Technology Summit, “Enhancing Social action for Older Adults Through Technology,” expert panelists discussed numerous examples of technology currently being used for a number of applications, from managing health to raising political awareness on issues to creating videos that capture stories about a community. The expert panel conversation focused on technology’s potential for social action, and challenges and opportunity areas for organizations and funders interested in furthering its use for social action. Key learnings from the panel are discussed below.

What One Thing will be the most important factor in promoting technology for social action?

Panelists’ responses to this opening question included the following:

- Ease of use
- Appropriate technology for older adults
- Ability to access information through connection to the cloud
- Personalized experience
- Natural fit of technology in terms of audience, medium, and workflow
- The presence of local champions for technology.

A natural starting point in considering how to use technology to enhance social action for older adults is the design, applications, and trends relevant to the technology itself. Though technology is not currently widely used by older adults for social action, the growth of technology platforms, applications, and audiences demonstrates its significant potential in this area. Panelists felt that technology can serve a valuable role along the continuum of social action through providing opportunities to integrate recruitment, engagement, and mobilization. However, the online engagement function is the one that currently has the most room for improvement, due to the difficulty in reaching those who are not yet engaged in a particular issue. In addition, with the large quantity of data available and being generated in this field, panelists felt that the creation of filters or other mechanisms to assist in navigating this information to find relevant social action causes (as well as for other purposes) would be valuable.

Panelists also discussed the expansion in technology platforms and applications, which will help advance their use for social action. In particular, panelists talked about the promise they see in platforms such as the simple-to-use iPad, video (through the Flip Camera and similar technologies), smart phones and text messaging, and social networking and virtual worlds. Three major future trends in the development of technology were also discussed: an increase in the amount of data and the capacity to analyze it, the integration of multiple technology platforms, and an increase in embodiment as a result of advanced user interfaces and immersive technologies.

User Considerations

As older adults are typically late adopters and face unique challenges in using technology, the user experience is an important consideration in understanding technology use for social action. Panelists felt that the most important factors in making technology accessible and useful for older adults in social action include the following:

- Ease of use in technology design
- User-centric design that meets the needs, interests, and wants of older populations
- Leveraging learnings from technology use in other fields and existing applications
- Personalized engagement strategies (including offline strategies)
- Transparency on data and privacy issues related to technology use
- Technology champions as advocates for its use
- Ability to reach ethnic minorities and lower socioeconomic classes

Policy Considerations

While technology factors and user considerations are both extremely important in designing appropriate technologies for older adults, policy developments are a key element in driving technology use on a widespread scale. Some of the key policy considerations for this area include the following:

- Expansion of broadband and mobile access, particularly in rural areas
- Systems that encourage open innovation in the development of infrastructure technology
- Addressing privacy and data security concerns
- Coalition building among nonprofit groups

Executive Summary *(Continued)*

Opportunity Areas for The SCAN Foundation

Panelists outlined a number of opportunity areas for The SCAN Foundation based on common challenges nonprofit organizations often face in technology adoption and implementation. Some of the biggest challenges for these organizations in this regard are a lack of the following: financial and personnel resources, adequate capacity to build and maintain technology use within the organization, and leadership that believes in and is committed to technology.

To help grantees and other organizations address these challenges and make progress in this area, panelists had the following recommendations for The SCAN Foundation and other funders:

- Share technology best practices and resources, and promote collaboration among grantee organizations
- Carefully vet organizations in regards to their technology use and planning
- Empower intergenerational initiatives and caregivers
- Focus on user benefits/outcomes from use of technology in meeting social action goals
- Use personalized communications approaches involving both online and offline strategies
- Improve public perception of older adults and technology
- Improve understanding of older adults' technology use
- Encourage application vetting, development, and innovation (technology, policy, legal)

Section I. Enhancing Social Action for Older Adults Through Technology: Technology Summit Expert Panel Content

Introduction and What One Thing

With the rise in the use of information and communications technology in all age groups, and the explosion of social media technology platforms and applications, the present is an exciting time for promoting the use of technology in social action. This opportunity is especially relevant for older adults, who have traditionally not had as many benefits of grassroots organizing and representation as some other age groups and causes. Technology represents a significant opportunity to organize, engage and mobilize older adults on issues important to them. The goal of this Technology Summit was to convene experts in the fields of technology, aging services, and social action to discuss ways that technology can be best used to facilitate this effort over the next 2-5 years. Below is the list of panelists:

- **Richard Adler** (*Research Affiliate, Institute for the Future*)
- **Tyrone Grandison** (*Program Manager for Core Healthcare Services, Healthcare Transformation Group, IBM Services Research*)
- **Evonne Heyning** (*Interactive Producer, TechSoup Global*)
- **Rey Muradaz** (*Founder, Interactive Aging Network*)
- **Paola Tonelli** (*Executive in Residence, UC Berkeley's Center for Entrepreneurship and Technology*)
- **Cecili Thompson Williams** (*Outreach Director, Campaign for Better Care at National Partnership for Women & Families*)

Please see the Panelist Biographies section for background information on each of the panelists.

Section I. Technology Summit Expert Panel Content: Introduction and What One Thing *(Continued)*

The discussion opened with each panelist being asked to identify **what one thing** is (or will be) the most important factor in promoting the use of technology for social action for the next 2-5 years. Their responses centered on the importance of user-centric design, local technology champions, and technology infrastructure to promote access:

- **Ease of Use:** There is a long history of creating technology that is easier to use, and progress is currently being made towards that goal with the advent of user-friendly technologies such as the iPhone, iPad, and Flip camera.
- **Appropriate Technology:** This includes access to technology that is both appropriate for use and usable by older adults. For example, the iPhone and its small touchscreen buttons may be difficult for people with Parkinson's Disease to use, but the larger iPad may be much more accessible.
- **Accessing Information via Cloud Computing:** The killer application in mobile computing will be access to the cloud, no matter the device, for on-demand computing that provides shared resources, software, and information. Cloud computing refers to splitting up software, data and computing power in different places and supplying them to computers and people as needed through Internet connection.
- **Personalized Experience:** It is important to make the online experience as familiar and as personalized as the offline experience in terms of content and interaction, resulting in an engaging experience for the user.
- **Natural fit of technology:** The continued and sustained use of technology will depend on getting the right data to the right person at the right time using the right medium. Naturalness of fit into workflow is also important to create seamless integration into current practices.
- **Local Champions:** A critical piece in driving technology use will be the ability to use "local champions," who can promote the use of technology among older adults in their community (whether offline or online).

The Technology Summit covered a variety of questions on how to best promote the use of technology for social action among older adults. The panel covered both technology-specific considerations, as well as issues specific to older adult users and the organizations that work with them. The resulting discussion focused on three major areas related to achieving this goal: **technology, user considerations, and policy issues**. Each is discussed in more detail below, with an emphasis on the drivers in each area to enable social action for older adults.

Section I. Technology Summit Expert Panel Content: Technology

A natural starting point in considering how to use technology to enhance social action for older adults is the design, applications, and trends relevant to the technology itself. Though technology is not currently widely used by older adults for social action, the growth of technology platforms, applications, and user base demonstrates its tremendous potential for social action. The definition of technology used by the expert panel is “information and communications technology including, but not limited to, mobile phones and web-based applications (i.e., websites, social networking, blogging, video sharing).”

Panelists were able to point to many examples of the use of such technologies for social action, and also for related applications such as health management. Examples of social networking and web-based uses for social action include teachers in Florida organizing on Facebook to oppose a bill that would restructure teacher pay, the use of Friendster to help elect political candidates in the Philippines, the use of Twitter during the political uprising in Iran to keep international observers informed in real-time about public reaction to the election results, and the Campaign for Better Care’s use of social media to engage older adults and their caregivers in advocating for improved care and quality of life for older adults. In addition, the use of video advocacy to capture stories on the issue of elder abuse eventually led to the inclusion of the Elder Justice Act in the Patient Protection and Affordability Care Act. Some of these initiatives are profiled in more detail in the Appendix A – Case Studies: Technology for Social Action section.

Panelists also discussed examples of technologies that had “gone viral” among older adults, such as the Brain Age game for the Nintendo DS platform, the popularity of the Wii gaming platform in senior centers, and the popular practice of forwarding emails and web links for YouTube videos (i.e. videos demonstrating the ease with which older adults learn to use iPads), and the common use of standard communication protocols such as SMS on mobile phones. An important element across these examples is that making technology use easy is a key part of promoting its use. In addition, the technology has a greater likelihood of being utilized if it fits with a need that is currently unaddressed or replaces a more cumbersome process.

The discussion also focused on the health applications of online social media, and its relevance for social action. Health-related examples included a project to connect pharmacists with community health workers to optimize medication management among older adults in an ethnic community, as well as the use of volunteers on the Health Commons in the Second Life virtual world platform to help organizations campaign on specific health issues. These health examples illustrate that online social media and their applications for older adults are rapidly expanding. Panelists felt that the use of technology for health and social action should be developed in tandem, with the progression path moving forward together, as there are many common themes in the usage of technology between the two fields.

Section I. Technology Summit Expert Panel Content: Technology (Continued)

Throughout the discussion, the following themes emerged around ways for technology to facilitate social action for older adults, strategies for successful implementation of technology in conducting advocacy, and emerging trends in technology and its implications for social action:

- **Technology facilitates recruitment and mobilization in social action but falls short in engagement:** Technology currently serves the recruitment and mobilization functions of social action well, but the area of engagement raises challenges and opportunities for improvement. This has been the experience of the Campaign for Better Care, and other organizations and campaigns. Cecili Thompson Williams pointed out that online recruitment is not difficult when someone is already interested in an issue; online media such as social networks, email, informational websites, and Twitter allow people actively seeking a way to get involved to get connected, which helps drive them towards taking action. Cecili Thomson Williams added that the mobilization element of social action has also been well served by technology through providing the ability to track impact in terms of actions people have taken on behalf of a cause (such letters sent in response to an action alert).

However, panelists agreed that engagement is always going to be challenging when people do not yet recognize the impact of an issue. To improve technology's ability to facilitate engagement, Evonne Heyning recommended that organizations think beyond information as a dead end, but rather think more broadly about the whole cycle of engagement, particularly how to use information towards specific goal-directed actions. For example, she stressed the importance of including action steps with information to effectively mobilize and engage people towards taking specific actions. In addition, technology elements such as databases help enhance organizations' engagement capacity by not only collecting user feedback, but also by tracking how users are reacting to the organizations' communications.

- **Data analytics and filtering are important enabling functionalities that support technology for social action:** Panelists also raised the issue of creating filters or other mechanisms to assist people in navigating large amounts of data generated through the use of technology for social networking and other initiatives. Rey Muradaz compared the situation to that of drinking out of a fire hose and highlighted the need for gatekeeping to assist people who do not have the ability to independently sort, filter and assess what advocacy group or cause

“Degrees of separation just got smaller through technology.”

“Whatever channels you use, you have to think about the whole cycle of engagement. Engagement has to create a loop.”

they should be joining. Important enablers for this function are mechanisms (whether human or mechanical interventions) to verify the accuracy of information and serve as trusted infomediaries. A better understanding of the information ecology in which people live will be critical to understanding the influence of intergenerational and social relationships and how to help find the most targeted applications for people.

- **Advances in technology platforms and applications will promote their use in social action:** Panelists highlighted several technology platforms and developments, which they thought would advance the use of technology in the area of social action. In particular, panelists pointed to the rapid growth in the use of mobile phones (particularly smartphones), and the emergence of advanced user interfaces in new devices such as the iPad. Paola Tonelli commented that the number of smartphones is rapidly increasing and will soon surpass the number of PCs. With developments in enabling sensor, memory and processing technologies, smartphones will soon offer computer processing capabilities on a par with personal computing devices. Additional capabilities will allow for more interactive information exchange between device and physical objects and images. Smartphones will also have the ability to recognize sound and will provide opportunities to address literacy challenges through text-to-speech capabilities.

Devices such as the iPad have many advanced features that not only offer the

iPad

Apple's iPad is a wireless tablet computer with a 3G data connection designed for Internet browsing, media consumption, gaming, and light content creation. The device is controlled by a multi-touch liquid crystal display that is sensitive to fingertips. It runs iPad-specific applications as well as those written for the iPhone and iPod touch, including e-book readers. Released in April 2010, it established a new class of hybrid device between smartphones and laptops. Apple claims that the iPad's battery can provide up to 10 hours of video, 140 hours of audio playback, or one month on standby.

The critical reception by reviewers has been generally positive. Walt Mossberg of *The Wall Street Journal* called it a "pretty close" laptop killer. In his review of the device, David Pogue of *The New York Times* claims that if non-technology-minded people like the concept of the device and can understand what its intended uses are, then they will enjoy using the device. *PC Magazine's* Tim Gideon's said that the device "will undoubtedly be a driving force in shaping the emerging tablet landscape," and Michael Arrington of *TechCrunch* stated that the iPad is a new category of device that will

replace laptops for many people. The iPad holds potential for older adults due to its simple interface and ease of use.

As of May 3, 2010, Apple had sold 1 million iPads.



Section I. Technology Summit Expert Panel Content: Technology (Continued)

Flip Video Camera



The **Flip Video** camcorder (owned by Cisco) has changed the way people capture and share video by making it easy to use and for uploading personal videos to video sharing websites. The sleek, compact, and affordable camera has an easy-to-use design, where the user can start shooting with one-touch recording within 3 seconds of turning the camera on. The Flip Video line has several products of varying size and memory: the Slide, Mino, and Ultra. In addition, the product comes with FlipShare 5.0 software pre-loaded, which expands video-sharing options including direct Facebook uploads, online sharing at FlipShare.com, and instant video sharing to mobile phones. Flip Video has been lauded for its simplicity, and as of April 2010, over 4 million Flip camcorders have been sold.

Video Advocacy

Video Advocacy is the use of video as a change-oriented tool for advocacy and powerful complement to more traditional methods. Powerful images and stories have an unrivaled candid authority that can help prompt awareness, concern, and action. Video advocacy is not about using video primarily for publicity, nor as an educational or training tool. Rather, it requires setting specific objectives, identifying target audiences, and developing a strategic plan for production and distribution to ensure the video has impact as a specific tactic within a broader advocacy strategy. Video advocacy is increasingly used by non-profit community organizations and individual advocates working on a particular campaign. Although video is a relatively easy medium to learn, it is a time- and labor-intensive process that requires significant commitment of human and other resources.

potential for it to replace the laptop as a mobile computing device, but will drive its adoption and diffusion among older adults. Panelists frequently referenced the iPad's convenient small-size form factor, simplicity in use, and long battery life as reasons for its success. Panelists mentioned that Apple co-founder Steve Wozniak envisioned the primary audience for the iPad as being older adults (specifically, his parents), and that YouTube videos featuring older adults interacting with the device attest to the ease with which older adults can learn to use iPads.

In addition, the use of the Internet and social networking by older adults, while still lagging other age groups, has been growing quickly in recent years, and has tremendous potential for facilitating social action (as illustrated through the *Case Studies* in Appendix A).

Panelists cited several technology platforms in particular as important for social action:

- **Video:** Panelists pointed to video as a particularly powerful platform for social action, serving as a channel that can directly tell people's stories, and one generates content that people can easily share. The use of video and video-sharing platforms such as YouTube has already been demonstrated through numerous community grassroots organizing initiatives.

Evonne Heyning commented that technologists increasingly view video as the new text, moving more and more away from writing. Conversations and information exchange are increasingly likely to take place through video. Older adults will particularly appreciate the medium for the ability to see and relate to faces and expressions. Video also offers opportunities to make generations more connected. The expansion of easy-to-use technologies such as the Flip camera will make it easier for community organizers as well as older adults to capture and share their stories (whether for politically related purposes or not) in the future.

“Video is the new text.”

- **Mobile Phone and SMS Text Messaging:** Mobile phones were repeatedly brought up throughout the day’s conversation due to their ubiquity and the richness of available applications, especially for smartphones. SMS texting is one of the most widely used communication methods, something that is not likely to change in the near future. Richard Adler stated that in the United States, 95 percent of all mobile phones use the same standard, allowing SMS to traverse all age groups and eliminate the digital divide that oftentimes exists with other technology platforms. Among the many examples of practical applications of SMS texting cited by the panelists include the Good Samaritan Project in Israel, where a person in need of help can text a request for assistance and nearby mobile users with the application can respond to assist them. Panelists saw the potential for wider use of these applications in social action, as Paola Tonelli stated that text messaging can be considered a communication mode that has “gone viral.” Panelists felt that the growth and ubiquity of SMS in the future will continue for all age groups, making it a powerful application for social action and other uses.
- **Social Networking, Virtual Worlds, and Other Web-based Applications:** Panelists also discussed numerous applications of social networking and other Web-based applications for facilitating progress in the area of social action, even though some of these applications are currently being used more heavily by younger age cohorts. Evonne Heyning pointed out that her experience in the Nonprofit Commons in the virtual world Second Life has included volunteers who are mostly women over 50. Virtual worlds also offer an opportunity to reach out to people of all ages who wish to conceal parts of their identity, because users can adopt avatars that take on a different physical appearance (i.e. green skin) that can hide ethnicity, gender, or other characteristics. In addition, the number of older adults on social networking sites such as Facebook is rapidly growing, which points to the potential for these applications to be used for social action by older adults in the future. Already, many politically-oriented Facebook Group pages are present (as well as on other social networks), and though the number of older adults currently belonging to such groups is unclear, the use of these applications for social action is expected to continue its growth.

Section I. Technology Summit Expert Panel Content: Technology (Continued)

- **Future technology trends:** Panelists identified several trends in the development of technology, particularly around the concepts of increased connectivity, data integration, and embodiment of technology.
 - **Data Analytics:** Tyrone Grandison commented that general technology trends include increasing instrument measurements, connectivity, and intelligence. Devices will generate more data, and better analysis and insight, which could lead to improved decision making capabilities with the assistance of technology. Data integration analytics will be critically important to advancing capabilities in decisions making, but raises issues over control of the analytics and insights as well as the secondary uses of data.
 - **Platform Integration:** Cecili Thompson Williams mentioned that we are likely to see more integrated engagement across platforms in real time, where users will be able to have unified access to all platforms through one portal, and increased personal exposure and visibility as a result. This will require achieving a fine balance to prevent any potential backlash against being continuously plugged in and losing access to people if they decide to turn off devices.
 - **Embodiment:** Evonne Heyning discussed how the nature of the user engagement through technology will change as technology evolves. For example, the evolution in user interfaces from the keyboard and mouse to today's touch-screen interface has influenced how users process information and experience information, resulting in more connection and engagement. Immersive 3D environments such as virtual worlds can dramatically enhance the ability for social action, as illustrated by the Nonprofit Commons on Second Life.

“It’s getting to a point where you can access all your platforms through one place and let every single person who’s following you know everything about your life.”

“We’re starting to see people in Second Life getting excited about social action in a totally different way than before.”

Section I. Technology Summit Expert Panel Content: User Considerations

An important part of the discussion on spreading the use of technology was the end user. This is especially true for older adults, as they face many unique challenges and are typically regarded as late adopters of technology. Below are some of the highlights from the panel on how to make technologies accessible and useful for older adults, with an emphasis on social action, in order to facilitate the adoption and broad diffusion among this age cohort.

- **Ease of Use:** This is a crucial consideration in the development of technology for older adults, many of whom may have limited familiarity with using technology in general compared to other populations. Panelists in particular highlighted the iPad due to its simplicity in ease of use and the fact that it runs only one application at a time. Richard Adler felt that there will be future improvements in ease of use for older adults, on the basis of recent advances with technologies such as the iPhone, iPad, and Flip cameras. Ease of use is also a sometimes much overlooked but important consideration for caregivers. Cecili Thompson Williams discussed that in order for often-overextended caregivers to adopt technology, it must provide benefits and make their work easier in terms of productivity and efficiency .
- **User-centric Design:** Panelists cautioned that there is still a lot of work to be done to find the best way to tailor existing applications to older adults, as initial development and early adoption is often focused on younger populations. Tyrone Grandison stated that any technology currently under development is going to be biased towards younger populations, and that more active research is needed to identify what works online as well as offline for older adults. Evonne Heyning mentioned that her experience in designing a trans media campaign for youth differs from that for seniors. For youth, she may involve gaming, text, and then maybe short videos, whereas for seniors she may include short videos with a podcast or a discussion forum that will allow people to have access to more detailed information.
- **Application Development for Older Adults:** Panelists also felt that showing older adults the benefits of technology from other fields, such as the use of management tools for health conditions, can help to facilitate their use in social action. The growing use of social media technology for health applications represents a potential opportunity for leveraging that same infrastructure in the development of social action applications. Panelists also pointed out that because older adults have typically been late rather than

“Caregivers often have had to adjust their work schedules and are frazzled and stressed. A technology is more likely to be adopted if it seems like it’ll make their life easier. But if it seems like it’ll add more to someone’s plate, it’s off the table.”

Section I. Technology Summit Expert Panel Content: User Considerations *(Continued)*

early adopters of many technologies, tailoring and expanding existing and trusted applications may be a better approach than trying to market very new applications to this population. This is also true for many nonprofit organizations and their use of technology, including those who work with older adults. Richard Adler commented that for every application, no matter how simple, there is a learning curve, and that the fact that an application is new does not necessarily appeal to older adults and many nonprofit organizations.

- **Personalized Engagement Strategies:** Cecili Thompson Williams indicated the need to be thinking strategically about how to access users through technology in a way that is respectful, and to give them an opportunity to engage at intervals that they set forth. Her recommended approach is to identify complementary strategies that are both online and offline. She also added that reaching people personally is an important element to successfully engaging them; her experience suggests that it is much harder for someone to disengage from a cause if there is an offline strategy to engage them, such as a phone discussion, compared to just running an online campaign. Panelists mentioned that with social networks, such as Ning, groups can form around specific issues and within specific localities, which enhances the opportunity for more in-person and personal interaction. Along these lines, Paola Tonelli commented that social isolation among older adults underscores the need for face to face or voice communication to be included in developing technology strategies to reach this age cohort.
- **Technology Transparency:** Valid concerns exist over data and public use of personal data. Panelists discussed the importance of being transparent about these issues with users, and making them aware of the facts and potential pitfalls behind the use of certain technologies. Cecili Thompson Williams felt that the recent negative news media (especially non-online) coverage of Facebook and its privacy policies can dissuade people, including older adults, from joining social networks where they otherwise could be effectively reached and mobilized. Identity theft and the threat of personal privacy invasions is a legitimate fear among this population. Rey Muradaz added that not understanding the underlying operations of a technology can be very frightening from a user perspective, because it leads users to wonder what else they do not know.

“Once you talk to someone on the phone, it’s much harder for them to disengage from your cause compared to if you were just running an email campaign.”

- **Technology Champions:** Fear of technology can be overcome through the use of local champions as advocates for technology. Panelists pointed to the importance of finding local intermediaries from the community to educate users on technology issues (including the aforementioned privacy and transparency issues), with peer modeling, caregivers, and children/grandchildren being effective channels to provide guidance. Panelists also pointed to the effectiveness of well-known public figures, such as Oprah's endorsement of Skype, in promoting certain technologies and increasing comfort with the technology. Panelists commented that a better understanding of the information ecology that people live in (such as the church, workplace, and social groups they belong to), and the role of intergenerational family members and caregivers as influencers, is important as technologies tend to evolve within units and communities. However, using other parties to reach older adults can be complicated by the fact that caregivers do not always consider themselves as caregivers, making them a difficult segment to reach. Panelists stressed the importance of investing extra effort and guidance for hard-to-reach populations and communities, including certain minority groups.

“Families, children, and caregivers are good at removing some of the barriers and showing you how to use technology.”

- **Users' Desire for Technology:** There is a need to better understand the specific interests, needs, and wants of older adults, and technology must be designed with these in mind to be truly effective in reaching that audience. Panelists emphasized that older adults do not always come to technology with a desire to use the technology itself, but rather as a means to realize certain benefits through achieving certain goals. Richard Adler commented that the key to engaging older adults for social action is to understand that older adults use technology as a mechanism to allow them to do the things that are important to them, such as emailing grandchildren or finding like-minded people. Another important consideration in this area is that the adoption of some technologies, particularly those that are assistive in nature, are sometimes pushed onto the user, which can lead to resistance to use that technology. Richard Adler used the example of an emergency response system in the form of a pendant that is worn around the neck which can alert outside parties in case of falls, and that an elderly parent may not want to walk around with a pendant that signifies their frailty and helplessness.
- **Ability to Reach Ethnic Minorities and Lower Socioeconomic Classes:** Panelists felt that mobile and social networking platforms can be very effective ways to reach ethnic minorities, as high levels of cell phone penetration and use of social networks is prevalent among minority groups. Cecili Thompson Williams reported that market research indicates that low-income and minority populations are more likely to have a social

Section I. Technology Summit Expert Panel Content: User Considerations *(Continued)*

networking profile and that they tend to frequently use this platform to communicate. Richard Adler added that the African-American community and the Hispanic community are adopting Facebook at a faster rate than the Caucasian community, especially among older adults. However, Evonne Heyning cautioned that technology barriers still exist for many minority and socioeconomic groups. For example, the homeless and displaced persons who can only access the Internet at public libraries may only have 30 minutes to find information on food, health care, and shelter.

“The fact that certain minority groups are adopting Facebook at a faster rate may be because they are more community-oriented to begin with, and their online world mirrors their offline one. It’s more of a natural adoption.”

Section I. Technology Summit Expert Panel Content: Policy Considerations

While technology factors and user considerations are both extremely important in designing appropriate technologies for older adults, policy developments are a very important element in creating the environment that will drive widespread use of these technologies. The section below outlines some of the policy considerations discussed by the panel.

- **Expansion of Broadband and Mobile Access:** Tyrone Grandison stated that an ecosystem of technologies exists, but not yet the infrastructure to support widespread use of broadband Internet, video sharing, and smartphones. As a result, it remains somewhat uncertain as to how technology use will evolve in the United States compared with Europe or other regions, which have a more open development approach to the underlying enabling infrastructure. Another issue that needs to be addressed is the divide between urban and rural areas. Paola Tonelli commented that access in rural areas, even with mobile systems, is very problematic because low population density means that the cost of base stations is not low enough yet to warrant broader installations. In cities, Evonne Heyning stated that socioeconomic conditions often drive the availability of and community access to technology. Paola Tonelli stated that while companies need to invest more in infrastructure, the government also needs to review current regulations and how that affects competition. She cited the example of Internet service providers having a monopoly in certain local markets, particularly in rural areas.
- **Open Innovation:** Panelists mentioned that the system currently does not openly encourage innovation in areas of infrastructure technology, which frustrates progress in terms of promoting broad access and more widespread use of technology. Tyrone Grandison stated that there needs to be a legal and regulatory framework that encourages innovation through introducing standards and market regulations that ensure low cost points that facilitate greater competition. The ability to provide a low-cost (if not free) resource in the form of the underlying infrastructure will encourage people to develop innovations in this area.
- **Privacy:** The use of technology for social action raises a number of privacy concerns that have yet to be fully explored, given how relatively new the field is. It is important to develop greater understanding of the extent of people's fears around technology and privacy (particularly the older adult segment), and before suitable solutions can be fully designed and implemented. Today, a much greater quantity of personal information, such as political campaign contributions, is available online and more readily accessible to the

“I think the real divide is not more affluent vs. less affluent but urban vs. rural.”

Section I. Technology Summit Expert Panel Content: Policy Considerations *(Continued)*

public than in the past. Whether the privacy threat is real or imagined, the perception of risk and personal threat exists. Panelists pointed out a number of challenges related to the secondary use of personal data in terms of who owns the data, who can use it, and for what end goal. Tyrone Grandison commented on the need to build in accountability techniques to provide access, control, and privacy safeguards, keeping in mind the fact that such needs often take a backseat to business interests. Such safety measures could include consent statements and privacy controls and protocols that allow for auditing and permissions.

New models of consent and opt-in safeguards could be adapted from those that are already well established in other industries, such as banking. Cecili Thompson Williams also cautioned that with the large amount of information stored in organizations' databases, such organizations need to be aware of the full extent of these issues and its implications when using technology. However, Richard Adler expressed an opposing view that privacy is no longer a significant concern for many technology users. In his view, the information age equivalent of the nuclear power industry's Three Mile Island accident [serious security breaches] has happened repeatedly, and the reality is that most people do not care about privacy once they have started to use the Internet widely. However, Richard Adler commented that for those not yet using technology, privacy is a barrier that continues to keep people, especially older adults, offline.

- **Coalition Building:** In advocacy, in order to achieve the maximum impact, it is often important for organizations trying to achieve similar goals to work together whenever possible. Technology and the Internet can certainly help facilitate these efforts through its ability to connect people and organizations. However, such connections can still be made difficult due to both logistical barriers, as well as organizations not wanting to share credit with each other. Cecili Thompson Williams feels it is incumbent upon organizations that are trying to do similar work, in many cases with almost the same mission statement and goals, to find ways to work together to maximize their impact.

The next section will focus on The SCAN Foundation's opportunity areas in helping facilitate the use of technology by its grantee organizations, including a discussion of some of the biggest barriers that nonprofits face with regards to using and implementing technology.

“Where advocacy groups have struggled is how much do we work together vs. how much do we get credit for that activity.”

Section II. Opportunity Areas for The SCAN Foundation

This section opens with a discussion of common challenges that nonprofit organizations face in the implementation and use of technology. The section then explores specific opportunity areas for The SCAN Foundation, in working with these organizations to improve the use of technology for social action for older adults.

Organizational Challenges in the Use of Technology for Social Action

- **Resource Constraints:** A dedicated budget, even a small one, for technology-enabled initiatives is often necessary for proper implementation of technological solutions. Panelists made references to the usually limited or nonexistent budget of nonprofit organizations to implement technology solutions. Evonne Heyning commented that such organizations often have few resources, in terms of both money and people. Although organizations such as TechSoup (which complies affordable resources for nonprofits) are good examples of technical resource organizations that can work with these nonprofits, the challenge remains the need to raise dedicated financing in the range of \$5K - \$50K to start a small project. Most nonprofits also do not have the personnel resources on staff to assist with the technical implementation and operation of projects, and therefore rely on volunteers within their community to provide those functions, which can be very difficult to find.
- **Capacity Building:** The lack of personnel with the time and capability to work on technology presents challenges for organizations (particularly smaller ones) to build and maintain their technology capacity. This can lead to misfires that reflect poorly on the organization, such as setting up a Facebook or Twitter account only to update it on an infrequent basis. Evonne Heyning added that organizations, especially in rural areas, face even greater resource challenges in their ability to attract and retain staff. While online training may help towards overcoming that goal, it is still not the most effective way to impart knowledge. Panelists suggested that organizations could look to empowering technology-savvy people within the organization as an official manager of the company's Facebook, Twitter, or other technology initiatives. Rey Muradaz raised the importance of building into the planning phase the fact that not all technology users are equally proficient, and keeping in mind that the learning curves involved for each organization will differ as a result.

“You have to build in two things. One is the technology support from the outside, resources that are specially dedicated to getting people on aboard. The other thing is building in the curve to learn and use technology well.”

Section II. Opportunity Areas for The SCAN Foundation *(Continued)*

- **Leadership:** Organizations also need to have leadership (in the organization itself and also at the board level) that understands and supports the strategic role of technology in meeting its objectives. Cecili Thompson Williams stated that organizational and board leadership is crucial to successful technology planning and implementation. There needs to be support among leadership positions so that the staff feels supported to take the necessary steps. In addition, it makes a big difference when an organization provides support and freedom to operate, which empowers the staff to be more creative and effective in their use of technology. Having leadership that understands the value of technology, and is not afraid to fail during the learning process, is a key but often missing element of successful technology adoption by nonprofits.

Recommendations for The SCAN Foundation in working with grantees

In considering how The SCAN Foundation can work with grantees to help them better use technology, panelists had specific recommendations, in light of the aforementioned challenges:

- **Share technology best practices and resources, and promote collaboration among grantee organizations:** Panelists repeatedly pointed to the fact that nonprofit organizations often lack both the financial and personnel resources, as well as the practical knowledge about how to access and use resources available to them. As a result, having clear and actionable information available on practical resources, guidance, and tips on technology use would greatly assist these organizations in their efforts to use technology more effectively (an example of such a resource is TechSoup, see Insert). A funding organization such as The SCAN Foundation could support efforts by convening forums on the subject, forming an advisory board for grantees, developing

“There are a lot of smaller organizations whose boards may not understand that technology really has to be a priority and some of the caveats that come with that, like we’re going to fail sometimes.”

TechSoup Profile



TechSoup.org offers nonprofits a one-stop resource for technology needs by providing free information, resources, and support. In addition to online information and resources, the organization offers a product philanthropy service called TechSoup Stock. Nonprofits can access donated and discounted technology products, generously provided by corporate and nonprofit technology partners. TechSoup believes that technology can enhance nonprofit work, making us more efficient and better able to serve our communities. (from www.techsoup.org)

information resources, and helping organizations share best practices among each other. Cecili Thompson Williams stated that the very fact that the Technology Summit is taking place is a major step in the right direction. Panelists also stressed the importance of encouraging collaboration between organizations that develop applications, as currently drivers for collaboration do not exist for the most part. Evonne Heyning commented on the need more frictionless collaboration between developers (such as developers who create iPhone applications with similar functions). Rey Muradaz added that funders have an important role in the collaboration process, because they can dictate that groups must work together and how they should do so.

- **Carefully vet organizations in regards to their technology use and planning:** It is also important to carefully vet prospective grantees in their readiness to use technology, in particular through reviewing their current and future plans for technology, and their leadership and capacity for supporting technology use. Tyrone Grandison suggested possible criteria to use in evaluating their readiness may include review of their strategic planning around technology, and/or their process for determining their target audience's level of online and offline engagement. Richard Adler indicated the importance of not only talking with the executive leadership, but also the staff itself to determine the level of commitment to technology throughout the organization. Evonne Heyning explored the issue of looking at the organization's past use of technology what they have already done for free, such as using tools such as Facebook or Twitter. Panelists also suggested paying attention to the smaller things about the way an organization conducts business, such as how they schedule meetings and use email, as a basic benchmark for their technology competency.
- **Empower intergenerational initiatives and caregivers:** A successful method for introducing technology in older adult efforts is to encourage intergenerational and caregiver-related initiatives in their grantee organizations whenever possible (see *Technology Champions in the Panel Content Summary*).

“Funders can dictate what groups must work together, such as Atlantic Philanthropies among aging organizations in Northern Ireland. Money drives a lot of decisions.”

“You want the people who will work with the technology to tell you their plans themselves, not the Executive Director. You have to see there is a true commitment all the way through the organization, not just from the top.”

Section II. Opportunity Areas for The SCAN Foundation *(Continued)*

Evonne Heyning's experience suggests that the best programs typically empower intergenerational relationship building around technology use, such as empowering teenagers to help their grandparents. The use of familiar trainers builds confidence, and collaboration tends to be much more successful at maintaining long-term engagement. Reaching older adults through their trusted family members and caregivers can help older adults themselves succeed in using technology. In addition, these initiatives should communicate to older adults that their voice is valued, and help them learn skills that allow them to independently create content such as videos and blogs. These family members and caregivers need not necessarily be trainers themselves in all cases, but can also act as important enablers in connecting older adults with the necessary resources.

- **Focus on user benefits/outcomes from use of technology in meeting social action goals:** People in general, but older adults in particular, rarely use technology for the sake of using technology, but rather as a means for meeting needs or realizing desired benefits. Focusing on these end goals and the action steps for getting there is essential for community-based organizations to engage older adults. Rey Muradaz proposed that organizations should create case examples or models of technology use that demonstrate its benefits, which in turn encourages its use. Panelists also suggested that organizations could identify “technological alternatives” to offline activities that older adults enjoy as a means of engaging them (for example, getting news from the iPad rather than reading a newspaper), and focusing on the interactive benefits of using a technological approach. In regards to social action, Cecili Thompson Williams added that the focus has to be on finding issues that are directly relevant to older adults' lives because it creates immediate buy-in and engages them. Rey Muradaz added that realizing a goal as a result of technology use, such as a governor vetoing a bill as a result of raising public awareness using Facebook (see Appendix A – Florida Teachers Against Senate Bill 6), is a powerful reinforcement of the behavior, by creating an empowering result that leads to continued use of technology.

“ If older adults better understand why they should go online and get involved and what the benefits are, they are a lot more likely to do so. Ultimately what is incredibly powerful is producing a result.”

“ If you have a fully online campaign that never speaks to a person, you're not going to get far enough, especially with this population. You need to figure out the balance, but offline things still need to be part of a an online strategy.”

- **Use personalized communications approaches involving both online and offline strategies:** One of the most effective ways of reaching older adults is through the use of a personalized approach. Many older adults may be wary of technology and not as familiar with electronic communications as other age cohorts. Cecili Thompson Williams commented that an identified need among older adults and their caregivers is their preference for personal communication that is both interactive and engaging. This helps ensure that the older adults feel personal identification with a social action cause. A recommended approach is to identify complementary strategies that effectively engage people both online and offline. Her experience suggests that it is much harder for someone to disengage from a cause if there is also an offline strategy, such as a phone discussion, compared to just running an online campaign.

- **Improve public perception of older adults and technology:** To make widespread progress in this area, panelists pointed to the importance of improving the public's perception about older adults and technology use. Cecili Thompson Williams mentioned that efforts to engage the public about how older adults are using technology can help build confidence among older adults. Richard Adler added that older adults need to be reassured that their participation in social action through the use of technology can bring tremendous value to the issues they care about.

- **Improve understanding of older adults' technology use:** Similar to improving public perception of older adults and technology, it is also important to improve understanding of older adults' use of technology and where gaps remain. Better understanding of older adults' needs, interests, and wants will help to design truly effective technologies for this population. More data about older adults' technology usage patterns and motivations can certainly help make progress in this area, such as through initiatives like mapping older adults' online activities and seeing what problems they and their caregivers perceive in technology use. Panelists also discussed the importance of being able to have older adults provide feedback on these issues, as Evonne Heyning mentioned that developers often do not have an opportunity to hear from the actual older adult users themselves.

“There is a motto of “Bringing Wisdom to the Information Age.” There is a tremendous resource out there of older people who could become, if activated and empowered with technology, a powerful force that is actively engaged in promoting causes.”

“It’s important to understand how older adults use technology, and what their fears are around technology.”

Section II. Opportunity Areas for The SCAN Foundation *(Continued)*

- **Encourage application vetting, development, and innovation (technology, policy, legal):** To expand interest and new efforts in this area, organizations can consider supporting initiatives such as an innovation competition on technology for social Action and older adults (perhaps through partnering with a technology platform such as Apple's iPad), or other research and development support. Paola Tonelli added that such development efforts could involve support for multidisciplinary research programs involving nonprofits, academic research centers, and commercial technology vendors. Cecili Thompson Williams added that application development could also include more targeted search capabilities for iPhone and other applications, as being able to search by functionality or "what are people like me using" would be particularly helpful for older adults who are wary about technology in the first place. However, Richard Adler cautioned that there should be a focus on first vetting existing applications and finding success stories and best practices related to them, as adults are typically late adopters to technology. In addition, innovation is needed not just for technology applications, but also in creating advancements around policy (particularly related to access and infrastructure) and law (particularly around privacy) to promote broader technology use in general.

Appendix

Appendix

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Appendix A — Case Studies: Technology Use for Social Action

Campaign for Better Care

Advocacy Issue

The Campaign for Better Care is a multi-year, multifaceted consumer campaign that involves advocacy among policymakers to improve the delivery of healthcare to meet the needs of vulnerable older adults, who are at the highest risk for low quality and high cost care. A primary goal of Campaign is to build a lasting and powerful consumer voice, by organizing older adults and their families as activists for better care. The Campaign for Better Care seeks to put a human face on the issue, to mobilize and engage patients and families to fight for the care they want and need, and to bring the voice of the consumer to the center of the policy debate. Their advocacy efforts also focus on strengthening the support system that surrounds them through team-based healthcare that is patient- and family-centered, comprehensive, well-coordinated, and anchored in primary care and linked to community support. Grassroots mobilization and volunteer management through technology are key to the campaign's goal to engage people, particularly older adults and their caregivers, family, and friends, in both online and offline actions.



Technology Strategy

An identified need among older adults and their caregivers is their preference for personal communication that is both interactive and engaging; consequently, the Campaign's goal is to ensure that the older adults feel personal identification with the Campaign. Once engaged, the Campaign for Better Care provides tools and resources for skill development and capacity building. The Campaign works to ensure the older adult and caregivers are effectively using online techniques and developing the ability to undertake conversion actions. These conversion actions engage them more personally through translating online to offline actions. Although e-mail continues to be the most prevalent online communication activity for the Campaign's primary target group, instant messaging, social networking, and blogging are gaining ground as communications tools. In particular, social networks specific to chronic diseases or to the care-giving role are emerging opportunities for individuals to engage with each other through self-directed actions.

A core element of the online campaign is to ensure the clarity of the message, and to make sure that the messages and communications strategy is appropriate for the target audience. The Campaign for Better Care has been able to conduct message testing (including timing of delivery), through focus groups, surveys, and polling to understand how people receive and understand the issues. Branding and website design are critical to the communications strategy to engage people on a personal level to get involved in the campaign and with each other. For example, the online headers “Know the Issues,” “Stories,” and “Make a Difference” (see graphic) are the hallmarks of personal interaction, through supporting the capacity to talk about issues, and find ways to engage in the campaign and with others.

The Campaign for Better Care is sensitive to prevent overwhelming people who are engaged in their campaign. Through database mining techniques, the Campaign for Better Care can categorize members according to their online behaviors and targets them accordingly through specific technology and content that will resonate with them. This capability to understand and assess the level of online activity allows the Campaign for Better care to actively transition people between different levels within the campaign. The Campaign for Better Care is also developing online mechanisms to track offline actions, through inviting people to sign up to take a pledge and then provide feedback on the outcome. Although not an entirely robust evaluation method, it nonetheless provides insight into people’s experience with the campaign, and the effectiveness of their messaging and communications strategy in engaging people.

Lessons Learned

The Campaign has identified a number of key success factors in facilitating the use of technology in advocacy campaigns, beginning with knowing the audience’s interest and capacity. With that foundation, it is then crucial to create relevant personalized approaches which take these audience factors into account. Campaigns should see themselves as not only advocates, but also capacity builders by providing tools and support to help their audience engage in new ways. Furthermore, identifying role models that act as champions of technology are important cultural references for helping people overcome fears of using technology.

As an organization, the Campaign for Better Care addresses people’s fear and misuse of technology through concurrent online and offline actions. These actions include making personal calls to people and providing opportunities to attend local events, to identify with people and the issues in a real-world context. Furthermore, simply having supporting resources available such as talking points, template articles, and step-by-step instructions for tech-based actions (such as adding a logo to a blog) has an important impact on the confidence of individuals to engage other people directly on issues, even if the individual never uses these resources. Finally, when it comes to technology, organizations do not need to be afraid about the possibility of failure at some point. Innovation and creativity are a natural part of the technology process.

<http://www.campaignforbettercare.org>

Appendix A — Case Studies: Technology Use for Social Action

Elder Justice Now Campaign

Advocacy Issue

To heighten the visibility of elder abuse, neglect and exploitation, and to give elders and advocates a voice in affecting policy change, the National Council on Aging and WITNESS (an international human rights organization) partnered with the Elder Justice Coalition in early 2009. This partnership was formed to create the Elder Justice Now campaign to ensure passage of the Elder Justice Act, legislation that had been under consideration by Congress for more than a decade. The Elder Justice Now campaign relied on video advocacy as the communication medium to put a human face on the issue and affect change.

Technology Strategy

In June 2009, NCOA and WITNESS trained 17 elder rights advocates from around the country in the use of video advocacy and selected 10 target communities on the basis of the congressional representatives in those communities. By October, with the help of the elder rights advocates, the campaign had collected over 150 video stories from victims, caregivers, law enforcement personnel, and advocates testifying to the reality of elder abuse in their communities. The stories were shared with members of Congress, their staff, as well as with the media and other advocacy groups. The mechanisms used to share these stories included online, social, and traditional media, and also traditional grassroots advocacy strategies to bring more attention to the issue. In particular, some of these efforts were targeted at Senate Majority Leader Harry Reid, who supported the inclusion of the measure into the Patient Protection and Affordable Care Act as a result.

In addition, in October 2009, a video documentary “An Age for Justice: Elder Abuse in America” premiered at a Capitol Hill briefing. The Elder Justice Now campaign is now encouraging local community actions throughout the country to Host-A-Screening of this short documentary film, in a nationwide effort to increase public awareness of elder abuse. Through the Elder Justice Now website, interested organizations can find a resource toolkit to help organize and facilitate a local host-a-screening event, and mobilize participants to take specific actions after the screening.



Lessons Learned

The goal was realized in March 2010 when the legislation was signed into law as part of health reform legislation. The Act now provides increased federal resources and leadership to support state and community efforts to prevent, detect, treat, understand, intervene in and, where appropriate, prosecute elder abuse, neglect and exploitation. It also authorizes funding for broad-based education and awareness efforts.

Due to the intense subject, the videos that were launched on the campaign's website as well as the documentary helped elevate and bring a face to the issue. The use of these technology mechanisms was a big part of the campaign's success in achieving its desired political outcome. Video can be a powerful and easy-to-use mechanism to bring attention to stories and causes for populations and local communities, particularly with the availability of simple, easy-to-use technology such as the Flip Camera.

<http://elderjusticenow.org/>

Appendix A — Case Studies: Technology Use for Social Action

Florida Teachers Campaign Against Senate Bill 6

Advocacy Issue

In March 2010, the Florida state legislature passed Senate Bill 6 (SB6), a measure that proposed completely overhauling the system by which teachers were paid in the state. In particular, the bill called for the introduction of a performance-based evaluation system, eliminating additional compensation for advanced degrees, and changing tenure tracks of new teachers. Teachers felt threatened by the potentially damaging professional impact of SB6, particularly the notion that a two tiered system would emerge on the grounds that not all teachers would be treated equally. The bill was also immensely unpopular with a broad coalition of stakeholders who joined forces with the teachers' union, including parents and the public. Advocates of the bill claimed that the measure would have helped Florida weed out bad teachers and retain stronger ones, whereas opponents argued that the measure would disincentivize teachers to work in Florida and that the states' children would suffer as a result. In response, teachers formed an online Facebook movement to mount an effective campaign to lobby elected representatives against passage of the bill.



Technology Strategy

Technology played a critical part in organizing and mobilizing advocates in the campaign to prevent passage of the bill. In particular, Facebook was used to organize many groups opposed to the bill and to activate networks into a structured lobbying movement. Many Facebook groups formed to show their opposition to the bill, such as "1,000,000 Strong for Florida Teachers Calling on Gov. Crist to Veto SB6!" and "Future Florida Teachers Against SB 6/HB 7189" and "Teachers who Oppose Senate Bill 6 (SB6) in Florida!!!! Speak UP !!!!!!" These groups amassed thousands of members and posted information encouraging people to call and email the governor to voice their opinions. In addition, those in opposition to the measure also created YouTube videos featuring their views and protests against the measure. Furthermore, the



Governor Charlie Crist's personal Facebook page was flooded with comments opposing the bill, leading the page's administrator to post a warning message to would-be commenters. As of April 9, 2010, the Governor's office had received 8,473 phone calls opposing the bill (with only 53 in favor), and 3,104 emails opposing from organized campaigns (279 for), and 8,700 individual emails against (8 for).

Lessons Learned

This organized online movement to prevent passage of the bill demonstrates the power of social networking tools like Facebook to quickly organize around political causes where strong public sentiment exists, leading to the desired outcome. The impact of the well-run campaign was an outpouring of opposition that was made demonstrably clear to the governor, in the form of the phone calls, emails, and Facebook messages/comments received. Though Governor Crist initially supported the bill, he ended up vetoing the bill after it passed the Republican-controlled state House and Senate. His vote against the bill was strongly influenced by the strong demonstrations of opposition, with the governor commenting that no other political issue had placed as much political pressure on him.

In this instance, the use of technology was especially powerful because the measure in question had overwhelming public opposition, while being mainly supported by politicians in the state Senate and House. However, if the public view were not so one-sided, organizing through technology may have led to a different outcome by generating awareness, emails, and phone calls from both sides.

Appendix A — Case Studies: Technology Use for Social Action

Obama for America New Media Campaign

Advocacy Issue

President Barack Obama's Obama for America (OFA) campaign for the 2008 U.S. presidential election not broke new ground in the strategic use of new media technologies for political grassroots organization. The use of these technologies but was a critical success factor in his overall political campaign strategy to mobilize a highly motivated electoral base that led to his election victory. By campaign's end, OFA's email list grew to an estimated 13 million people, including three million online donors. Although the media frequently cited the importance of youth in the election of Barack Obama, the volunteers and donors that formed the engine of the campaign were, according to a number of staffers, middle-aged or older. Even on the campaign's own social network, My.BarackObama.com, the primary user was not youth.



Technology Strategy

The OFA campaign relied on the use of the campaign's official website to convert new subscribers. Page design elements as well as landing page text and images often underwent continuous testing and analysis over the course of the campaign in support of that strategy. This core technology strategy included a number of supporting elements:

- Build an email list first and foremost, before asking supporters to make a gift to the campaign. Building the relationship with supporters over time produced better results. The campaign set a limit of no more than 3 emails in one day sent to any individual's address.
- Once engaged, the tactic was to send high-quality, engaging emails to those constituents, to make them a part of the story, to use authentic organizational content – video (produced 1,800 videos with 889 million views) text (enabled geo-targeting of messaging), and images – to tell a compelling story, and to use email and phone calls to ask online volunteers to participate in offline programs.
- The campaign spent over \$16 million on online advertising in 2008, \$10 million of which was spent on Google's AdSense network and search result advertising. Advertisements like those in Google's AdSense program had a return on investment in the form of new sign-ups of three times the cost of the ad.

- User-centric tools and services such as the “be the first to know” the vice presidential candidate engaged new supporters by offering a simple, free “premium” for signing up. The Vote for Change website offered voter registration forms and information, and My.Barack.Obama.com was a self-directed community organizing toolkit.
- An effective tactic that was reinforced by the Obama campaign was the use of the email append process to obtain email addresses for supporters who had undertaken a positive offline action for the campaign but for whom they only had mailing addresses, such as direct mail donors.
- Invitations to participate in the campaign, such as offering people a free bumper sticker just for signing up, or offering prizes, such as a chance to win exclusive experiences such as Dinner with Barack, were successful strategies that engaged people through making the experience personal.

External social networks also played a crucial but not central role by building a tangible grassroots mentality. These networks helped to create a sense of a bottom-up community by giving people the tools to host events, share enthusiasm with their neighbors, and organize where they lived. The campaign deliberately selected fewer than 20 social networks and kept their efforts focused. In the end, about five million supporters were engaged with the campaign across all external social networks. The real value of the social networking was in distributing the message and building branding and visibility, rather than driving fundraising or volunteerism.



One area where technology was weak was the integration of online recruitment with offline field activities. Once volunteers connected to a local field office, their online and offline experiences ceased to fully integrate. The new media tools did not reflect offline neighborhood team structures in a meaningful way. Although the field program did use a complex Web-enabled database to manage volunteers and voter contact (the Voter Activation Network), it was never fully integrated with the new media program's Blue State Digital tools that managed the online organizing program.

Lessons Learned

Truly impressive was the flawless execution of the new media strategy. The end result was an email list of 13 million individuals, five million friends on various social networks, and more than half a billion dollars raised through direct online donations. Key success factors identified in M+R's analysis of OFA's New Media Campaign include the independence afforded to the new

Appendix A — Case Studies: Technology Use for Social Action

Obama for America New Media Campaign *(Continued)*

media group within OFA, the recruitment of professional talent, and the consistent testing of the new media group's online tactics and alignment of strategy with other elements of the OFA campaign. Some of the other success factors included the following:

- **Discipline** – The new media group displayed considerable discipline to stick to best practices, focus on message content that supporters value, adhere to a consistent brand, including look and feel, and message narrative, and align actions with other elements of the campaign.
- **Talent** – The new media group was established as a standalone department within the campaign, elevating it on a par with other critical campaign departments, such as finance and communications. The 81-person staff represented the best individual talent in their individual professions (170 including volunteers).
- **Inclusive** – The campaign made a deliberate attempt to be inclusive of the supporter base and to not only focus on the candidate. The campaign also created tools and forums that encouraged two-way interaction and invited people in to the campaign.
- **Agility** – The ability to react quickly to news events and other issues within hours was oftentimes facilitated by technology. In particular, the campaign used video as a rapid response tool. Rather than react to the news cycle, the new media team oftentimes preempted traditional news media.
- **Authenticity** – The campaign achieved a respectful balance in providing its supporters with engaging and insightful versus dumbed-down information through sharing real, inside campaign information with its supporters, while making that information accessible and meaningful.
- **Content** – No matter the medium used, the new media team demonstrated a serious and intensive focus on content. The campaign crafted messaging deliberately grounded on the campaign narrative, with the focus squarely on what supporters cared about at any given moment. The campaign also built profiles of specific online personas, giving them each a unique voice.
- **Analytics** – The campaign was a data-driven operation with a dedicated six-person team that tested and measured every aspect of the online program. If the data showed a program to be ineffective, the program was scrapped and resources were directed towards higher-performing strategies.

www.barackobama.com

Appendix A — Case Studies: Technology Use for Social Action

Social Actions Website

Advocacy Issue

Social Actions is an online website that makes it easier for people to find and connect with opportunities for social action and provides resources and tools to develop applications for websites, social networks and mobile devices. The website allows people to find actions, share actions, and perform tasks such as signing a petition, donating money, volunteering, or contributing to a social wiki. The website's objectives are to support civic engagement (by supporting initiatives that help people engage with the causes they care about), networking weaving (by championing collaborators that advance the work of social innovators), and open source development (by developing open source software that adds a philanthropic layer to the web). The website's mission is "to make it easier for people to find and share opportunities to make a difference."



Technology Strategy

Social Actions supports initiatives that help people engage with the causes they care about through a number of mechanisms: aggregating actions from more than 60 online platforms; allowing users to receive action alerts on the issues and causes they care about; and providing open source software tools that allow users to embed actions into websites, social networks, and mobile phones.

Impact

To date, Social Actions has realized the following impact:

- 35+ action packs activated
- 60+ online platforms partnered with Social Actions
- 100+ memberships in the Social Actions developer community
- 20,000+ connections made per month between people and actions
- 100,000+ opportunities to make a difference gathered and disseminated

<http://socialactions.com/>

Appendix B — Key Technology Summit Definitions

- **Technology:** Information and communications technology including, but not limited to, mobile phones and web-based applications (i.e. websites, social networking, blogging, video sharing).
- **Social activism:** Individual and collective actions designated to identify and address issues of public concern (Referring to older adults, caregivers, individuals, and organizations).
- **Older adults:** An older adult is typically defined by age for specific programs or services. AARP's age requirement for membership is 50, Older Americans Act services define eligibility for services as 60, except for the Title V program which is 55 and Medicare defines age eligibility as 65. For this discussion an older adult is defined at 60, as it is anticipated that the advocacy efforts will focus on home and community based services, which the bulk of are provided through the Older Americans Act. This may also include Baby Boomers in some cases.
- **Service Provider Organizations:** A service provider is an organization that provides services and supports for older adults in the community.
- **Volunteer:** A volunteer can be an older adult, family caregiver or other person who provides support to service provider organizations.

Appendix C - Data on Technology Use for Social Action

Generational Differences in Online Activities: 2009

Generations Explained

Generation Name*	Birth Years, Ages in 2009	% of total adult population	% of internet-using population
Gen Y (Millennials)	Born 1977-1990, Ages 18-32	26%	30%
Gen X	Born 1965-1976, Ages 33-44	20%	23%
Younger Boomers	Born 1955-1964, Ages 45-54	20%	22%
Older Boomers	Born 1946-1954, Ages 55-63	13%	13%
Silent Generation	Born 1937-1945, Ages 64-72	9%	7%
G.I. Generation	Born -1936, Age 73+	9%	4%

Source: Pew Internet & American Life Project December 2008 survey. N=2,253 total adults, and margin of error is $\pm 2\%$. N=1,650 total internet users, and margin of error is $\pm 3\%$.

*All generation labels used in this report, with the exception of Younger - and Older - Boomers, are the names conventionalized by Howe and Strauss's book, *Generations*: Strauss, William & Howe, Neil. *Generations: The History of America's Future, 1584 to 2069* (Perennial, 1992). As for Younger Boomers and Older Boomers, enough research has been done to suggest that the two decades of Baby Boomers are different enough to merit being divided into distinct generational groups.



• *The focus of the panel discussion was primarily on older boomers, the silent generation, and the G.I. generation (ages ~60+)*

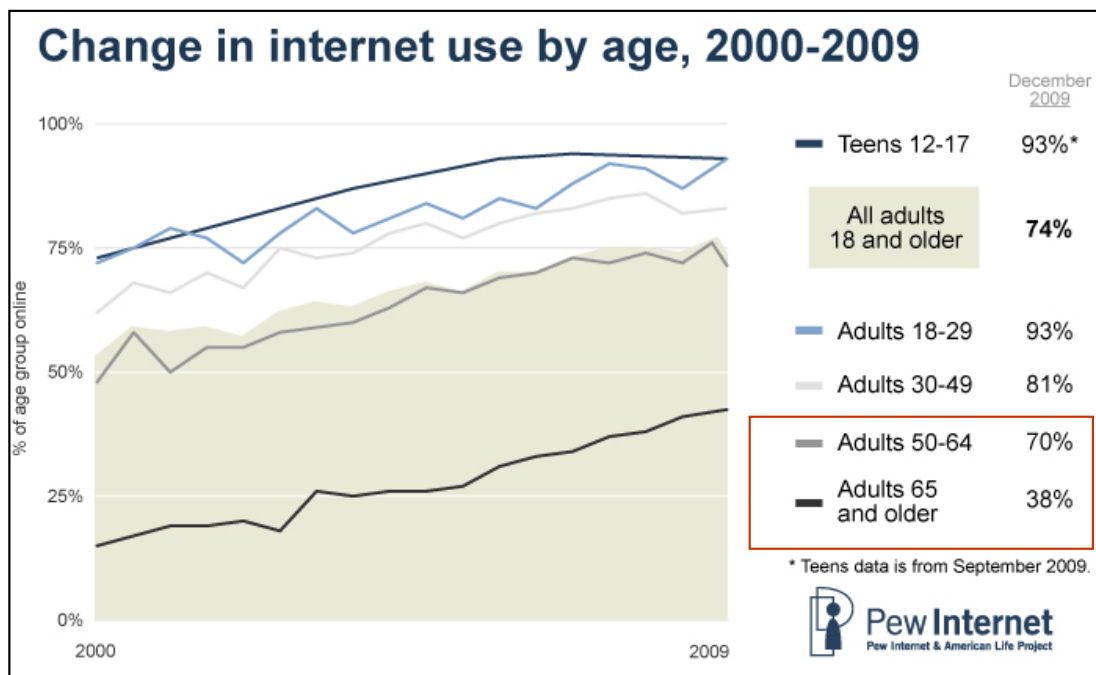
• *Younger boomers are also important given their role as caregivers and the next group of older adults*

• *Internet usage decreases with age in general (see next slide)*

• *Older adults are more likely to get health information, make purchases, and bank online but less likely to play games, watch videos, and social network, blog or instant message online*

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Change in Internet Use by Age and over Time: 2000-2009



Internet usage decreases with age (the percentage of adults 65 and older has by far the lowest usage rates, ~38% in 2009), though all groups have been increasing from 2000-2009

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Older adults are politically engaged but less likely to use social media for these purposes

The socio-economic divide in online civic and political activity has been attributed to internet and broadband access at home

- Online political activity is highly correlated with income

Older adults have the highest rates of voting turnout and registration, but participation in online political and civic forums using social media tends to be dominated more by young adults

- Participation in online political and civic forums is less structured by education and income than other forms of political participation
- **37% of internet users aged 18-29** use blogs or social networking sites as a venue for political or civic involvement, compared to **17% of online 30-49 year olds, 12% of 50-64 year olds and 10% of internet users over 65**

Pew Research reports that just over one-third of Americans (36%) are actively involved online in a civic or political group, **of whom 5% communicate with their fellow members using digital technologies only**

Source: The Internet and Civic Engagement (Pew)

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Current Use Trends With New Media Tools

•**Cell phones**

- Penetration is ~80-90% in US
- 152B SMS messages are sent every month; estimated 188 per subscriber per month in the US

•**Email**

- 91% of all online adults use email

•**Online Video Sharing**

- More than 1B videos viewed daily on YouTube
- Every minute, 24hrs of video is uploaded to YouTube

•**Social Networks and Virtual Worlds**

- 193M people are active Facebook users
- More than 5B content items shared weekly
- Surveys have shown that some nonprofit organizations are likely use Facebook and Twitter as social networking options
- 18 M accounts registered on Second Life as of January 2010

•**Blogs**

- Since 2006, blogging has dropped among teens and young adults while simultaneously rising among older adults
 - 14% of online teens now say they blog, down from 28% of teen internet users in 2006
 - Since 2005, roughly ~10% of online adults maintain an online journal or blog, though there has been some increase among older age groups

Source: Pew Internet Project. M+R. CTIA. Facebook. YouTube. SecondLife

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Online Activities By Age

	Online Teens* (12-17)	Gen Y (18-32)	Gen X (33-54)	Younger Boomers (45-54)	Older Boomers (55-63)	Silent Generation (64-72)	G.I. Generation (73+)	All Online Adults**
Go online	93%	87%	82%	75%	70%	58%	21%	74%
Teens and Gen Y are more likely to engage in the following activities compared with older users:								
Play games online	78	50	38	28	28	25	18	35
Watch videos online	57	72	57	49	36	34	14	52
Get info about a job	30+	64	55	43	36	11	10	47
Send instant messages	66	50	38	25	23	25	18	38
Use social networking sites	46	67	36	26	9	11	4	35
Download music	59	58	46	22	21	16	5	37
Create an SNS profile	55	60	29	16	8	5	4	29
Read blogs	49	43	34	27	25	23	15	32
Create a blog	26	20	10	6	7	6	6	11
Visit a virtual world	10	2	3	1	1	1	0	2
Activities where Gen X leads or older generations dominate:								
Get health info	28	68	82	74	81	70	67	75
Buy something online	38	71	80	68	72	56	47	71
Bank online	*	57	65	53	49	45	24	55
Visit govt sites	*	55	64	62	63	60	31	59
Get religious info	26+	31	38	42	30	30	26	35
And for some activities, the youngest and oldest cohorts may differ, but there is less variation overall:								
Use email	73	94	93	90	90	91	79	91
Use search engines	*	93	93	96	89	85	70	89
Research products	*	84	84	82	79	73	60	81
Get news	83	74	76	70	69	56	37	70
Make travel reservations	*	65	70	69	66	69	65	68
Research for job	*	61	59	57	48	33	9	51
Rate a person or product	*	37	35	29	30	25	16	32
Download videos	31+	38	31	21	16	13	13	27
Participate in an online auction	*	29	31	27	26	16	6	26
Download podcasts	19	25	21	19	12	10	10	19

Summary data points

- The **top online activities for older adults** compared to other generations are getting health information, purchasing, banking, visiting government sites, and getting religious information
- The **least likely online activities for older adults** compared to other generations are playing games, watching videos, job listings, the use of instant messaging and social networking, downloading music, reading and writing blogs, and virtual worlds
- Online activities with less generational variation** include using email, search engines, news, travel reservations, research downloading videos

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Older adults are highly politically engaged compared to other age groups

Older adults are highly politically involved (with higher rates of voter registration and turnout than other age groups)

In general, voting participation increases with age

Source: Older People and Political Engagement: From Avid Voters to “Cooled-Out Marks”

Table 1
Percentage of Voting-Age People Who Voted in Presidential Elections, 1980–2004

AGE GROUP	1980	1984	1988	1992	1996	2000	2004
18–24	40%	41%	36%	43%	32%	32%	42%
25–44	59	58	54	58	49	50	52
45–64	69	70	68	70	64	64	67
65+	65	68	69	70	68	67	69

SOURCE: U.S. Bureau of the Census, *Current Population Survey*, November 2004 and earlier reports.

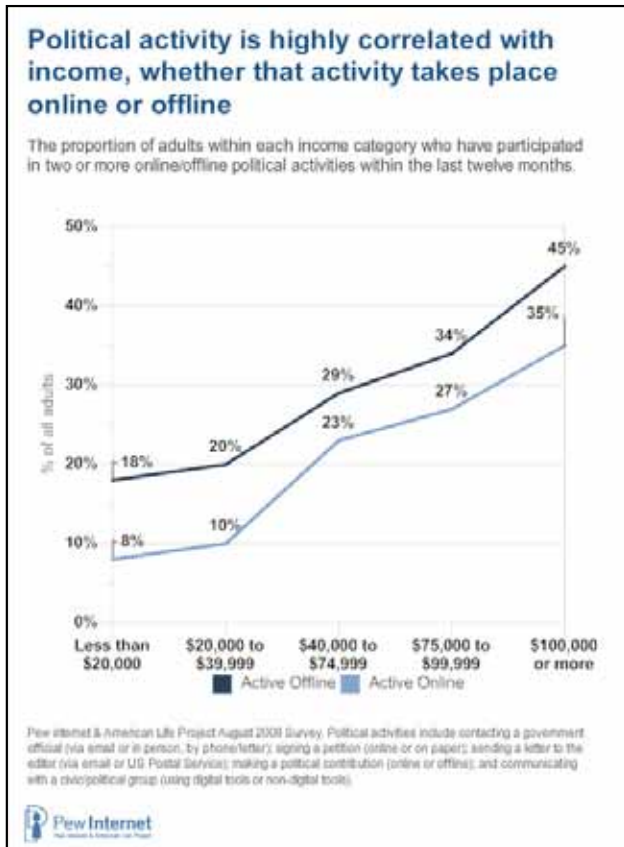
Table 2
Percentage of People Registered to Vote in Presidential Elections, 1980–2004 by Age Group

AGE GROUP	1980	1984	1988	1992	1996	2000	2004
18–24	49%	51%	48%	53%	49%	45%	52%
25–44	66	67	63	65	62	60	60
45–64	76	77	76	74	74	71	73
65+	75	77	78	77	77	76	77

SOURCE: U.S. Bureau of the Census, *Current Population Survey*, November 2004 and earlier reports.

Appendix C - Data on Technology Use for Social Action

Political Activity is Highly Correlated with Income



- The **fundamental socio-economic nature of online participation in political and civic engagement**, such as contributing money, contacting a government official, or signing an online petition, remains dominated by those with high levels of income and education.

- The **strong positive relationship between socio-economic status and most of the measures of internet-based political engagement** suggests that the lower level of online political activity among those who are lower on the socio-economic ladder may be a **consequence of limited internet and broadband access at home**

Appendix C - Data on Technology Use for Social Action

Current State of Online Political and Social Content Creation

The online participatory class

The proportion of internet users who have posted political or social content using digital tools

Post comments about a political or social issue	12%
Get political info on a social networking site	8
Write about political or social issues in your own blog	4
Start/join a political group or cause on a social networking site	4
Friend a candidate on a social networking site	4
Post political news on a social networking site	4
Post pictures online about a political or social issue	3
Post video online about a political or social issue	2
Did any of these	19

Source: Pew Internet & American Life Project August 2008 Survey. Margin of error is +/-3% based on internet users (n=1,655).



Those who join the online political discussion on social media sites are highly engaged in other civic/political venues as well

The proportion within each column who engage in different civic/political behaviors

	Among all adults	Among those who post content online about political or social issues	Among those who go online, but do not post content about political or social issues	Among those who do not go online
	%	%	%	%
Overall engagement in civic or political matters				
2+ offline civic/political activities	27	53*	27	14
2+ online civic/political activities	15	45*	15	na
Member of a political or civic group	36	56*	38	19
Civic communications				
Contacted a government official	30	50*	30	18
Signed a petition	32	61*	33	13
Sent a letter to the editor	10	22*	9	3
Monetary contributions				
Made a political contribution	18	33*	18	11
Made a charitable donation	67	81*	74	43
Made a contribution to a place of worship	58	62	61	54

According to Pew, a **relatively small percentage of Internet users currently use the Internet to post content on political and social activism**. The most common political and social activist applications on the web are posting comments or getting information; blogging, social networking, and picture/video sharing being less common. However, users of the Internet for political and social activism are likely to be involved in other political venues as well.

Appendix D — Panelist Biographies

Richard Adler (Research Affiliate, Institute for the Future)

Richard Adler was born in New York City, raised in Colorado, attended college in New England, taught in the Midwest, and spent most of his working life in Silicon Valley. These many changes of scene have given him a broad perspective on American culture and a strong curiosity about what is coming next. More recently, he has broadened his viewpoint further by working on international projects in Europe and Asia.

Richard spent a decade on the staff of the Institute for the Future (ITF) (before the full emergence of the Internet) where his research focused on the potential of online communications for individuals and organizations. After leaving ITF, Richard pursued an interest in the intersection of aging and technology. He joined the staff of SeniorNet, where he built a national network of more than 100 Learning Centers that offered computer classes specifically designed for older adults (there are now more than 200 in operation). While at SeniorNet, he also conducted the first national study of computer use by seniors and designed and directed an award-winning online project that enabled older adults to engage in discussions of important national issues. Over the last decade, Richard has worked for clients ranging from large corporations to small start-ups.

In 2006, Richard returned to ITF as a research affiliate. He is currently co-leading a multi-client research program called Boomers: The Next 20 Years. He believes that the aging of our population is not just an economic burden but will also provide exciting opportunities for innovation. Richard also contributes to several other ITF programs, including Health Horizons, where he has done work on anytime anyplace health care and games for health. Richard holds a BA from Harvard, an MA from the University of California, Berkeley, and an MBA from the McLaren School of Business at the University of San Francisco. Outside of work, Richard likes to travel and experience other cultures.

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Tyrone Grandison (Program Manager for Core Healthcare Services, Healthcare Transformation Group, IBM Services Research)

Tyrone Grandison is currently the Program Manager for Core Healthcare Services in the Healthcare Transformation Group of the IBM Services Research organization, which is based in Hawthorne, New York. His immediate interests are in developing innovative solutions for ensuring patient privacy protection and for integrating information from multiple sources to get more complete views of patients to enable better decision making. He is spearheading the effort in leveraging Online Social Networks to augment Healthcare Delivery.

Appendix D — Panelist Biographies *(Continued)*

Prior to this, Tyrone led the Intelligent Information Systems (Quest) team in the Computer Science department at the IBM Almaden Research Center, which is based in San Jose, California. The team has pioneered research in Relational Database Privacy, Disclosure-Compliant Query Processing for RFID and Mobile Data Networks, Security Exception Handling in Healthcare Information Systems and Large Scale Text Analysis of Online Data. The work on Database Privacy was the first to demonstrate that privacy protection was possible at the database level without negative impact on the system and that both security and privacy controls can exist in a common infrastructure. The Disclosure-Compliant Query Processing for RFID and Mobile Computing research was the first to show how to perform privacy and security compliant queries across autonomous and sovereign RFID databases and Mobile devices. Traditional security workflows in Healthcare Information Systems routinely bypass the IT protection layer. The work in this space was the first to show how to reduce this phenomenon and create more policy-compliant systems, which is necessary for both legislative compliance and to protect patients.

Tyrone is a Distinguished Engineer of the Association of Computing Machinery (ACM), Senior Member of the Institute of Electrical and Electronics Engineers (IEEE) and has been recognized by the National Society of Black Engineers (i.e. Pioneer of the Year 2009), the Black Engineer of the Year Award Board (i.e. Modern Day Technology Leader 2009, Minority in Science Trailblazer 2010) and received the IEEE Technical Achievement Award in 2010 for pioneering contributions to secure and private data management. Tyrone received his B.Sc. and M.Sc. degrees from the University of the West Indies, Jamaica in 1997 and 1998, respectively, and a Ph.D. degree from the Imperial College of Sciences, Technology and Medicine in the University of London, United Kingdom in 2003.

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Evonne Heyning (Interactive Producer, TechSoup Global)

Evonne Heyning has spent the last thirty years at the intersection of art, technology and social change as an advocate for access and care across live and virtual networks. After finishing a BA in Boston and serving NGOs in three countries Evonne dedicated a decade to media production, education and nonprofit management between Boston, Providence and Los Angeles working with a handful of dynamic local and global nonprofits in animal welfare, assault and crisis care.

Evonne currently produces technology-enabled events and campaigns for nonprofit public sector programs, government agencies, NGOs and universities. She consults as an Interactive Producer with TechSoupGlobal, providing the community team content across multiple channels and making sure nonprofits are aware of the great opportunities available. Evonne brings a wealth of experience in web and interactive design, social gaming, video production in

collaboration with community partners, virtual worlds and the future of the 3D web landscape. Her avatar In Kenzo can be seen across social media channels @amoration and at the Nonprofit Commons in Second Life @NSPL for virtual events.

Starting her own nonprofit Amoration six years ago Evonne has explored the intersection of connection, access, network culture and compassion across a wide network of social change agents. For the last year she has produced the Lightning Temple public arts experiences engaging all ages in energetic interactivity. With over a dozen short films and videos, two published books and numerous articles across the web Evonne is known as a high-tech connector and catalyst for transmedia productions.

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Rey Muradaz (Founder, Interactive Aging Network)

Rey Muradaz is the co-founder and Chief Technology Officer for The Interactive Aging Network (IANet). IANet helps national aging services organizations, foundations and governments use information technology to enhance programs and expand services. Two of IANet's signature achievements are: The National Council on Aging's BenefitsCheckUp, a decision support service to determine a user's potential eligibility for over 1,300 health, medication and financial benefit programs (in its ten-plus year history, BenefitsCheckUp has identified over \$8 billion of benefits for older adults); and Access to Benefits (A2B), a project funded by the Atlantic Philanthropies to expand the BenefitsCheckUp concept in Northern Ireland. In Belfast, Rey led a coalition of non-profits and government agencies through a feasibility and design process and the creation of a charitable organization to carry on the work (in its first year of public operation (2009), A2B screened more than 10,000 older adults and identified over £3 million of potential benefits).

Rey is currently developing and managing the data-gathering tools for two survey projects: A study of the experiences of program participants in the Hartford Geriatric Nursing Initiative to improve its future activities; and a Weinberg Foundation research project with Share the Care in Orlando, FL, where family caregivers are receiving web-based assistance to help older adults live longer and more productive lives in their communities. Through IANet, he is also providing strategic technology and business development advice to Monitor-Rx, a joint venture with the American Society of Consultant Pharmacists Foundation. Monitor-Rx is a web tool that evaluates an older adult's medication regimen for potential adverse outcomes. It is designed for consultant pharmacists and other clinicians and is currently being used as part of a research grant in California sponsored by the Center for Technology and Aging.

Appendix D — Panelist Biographies *(Continued)*

Rey lives in Naples, FL, and has a BA (Writing Seminars) from Johns Hopkins University, an MBA from UNC at Chapel Hill, and a JD from Brooklyn Law School. He has no spare time because he has two sons (11 and 7) and a daughter (15 months), but if he did, he would spend it traveling, golfing and playing the drums in Beatles Rock Band.

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Paola Tonelli (Executive in Residence, UC Berkeley's Center for Entrepreneurship and Technology)

As Head of the Vodafone R&D centers in Spain from January 2006 to December 2007, Paola Tonelli led research projects in the area of new mobile applications. Her team of experts focused on developing concepts and prototypes for advanced mobile services to demonstrate how the convergence of mobile communications, medical advances and social networking can help improve people's fitness and health. In 2008, she was appointed Executive-in-Residence at the Center for Technology and Entrepreneurship at UC Berkeley to use her knowledge of the wireless industry to provide commercialization opportunities for the University technology.

While at Vodafone (1999-2008), she represented her company at the governance level in several worldwide standards organizations and provided thought leadership and guidance to facilitate development of the mobile ICT industry, by encouraging cooperation and global interoperability standards. She also lobbied regulators to provide fair licensing regimes for mobile operators and promoted the benefits of 3G mobile technology with financial institutions both in Europe and the US. She has been a frequent speaker in many venues, ranging from CNN's Business Week in Review in London, to International Telecommunications Union conferences in South Africa and Asia Pacific and the 3 GSM World Congress.

From 1991 to 1999 she worked for AirTouch Communications in Walnut Creek. As Senior Director for Industry Advocacy, one of her key accomplishments was to convince the global 3G standards organization to minimize the difference between two competing air interface standards. Previously, she contributed to developing requirements for the Globalstar satellite system as well as for advanced features in cellular networks. Her supervisor at one time was W.Y. Lee, one of the fathers of cellular communications. In 1991-1992, she was AirTouch's Italian Government liaison during AirTouch's bid for a GSM cellular license in Italy. Prior to joining AirTouch, Ms. Tonelli served in various technical and management positions at Pacific Bell and at AT&T Bell Laboratories. For several years she was Secretary of the San Francisco Bay Area Chapter of the IEEE Vehicular Technology Society.

Ms. Tonelli was born and raised in Parma, Italy. While in high school she received an American Field Service scholarship to a prestigious preparatory school in Massachusetts, where she graduated with honors and won the first prize from the Boston Globe for the best literary contribution to a school paper. After studying theoretical Physics at the University of Parma with a Fermi alumnus, she moved to San Diego, California, where she received her degree. Later, she studied Mechanics and Structures at the University of California in Los Angeles and Computer Science at Bell Laboratories. She speaks Italian, English, French and Spanish.

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Cecili Thompson Williams (Outreach Director, Campaign for Better Care, National Partnership for Women & Families)

Cecili Thompson Williams is the Outreach Director on the Campaign for Better Care at the National Partnership for Women & Families. In this capacity, she is responsible for grassroots and coalition mobilization to press for changes in health care delivery that older adults with multiple health problems and their families urgently need and deserve. The Campaign is a multi-year effort to continue to push for health care delivery system reforms to improve chronic care for vulnerable older adults. A primary goal of Campaign is to build a lasting and powerful consumer voice by organizing older adults and their families as activists for better care. The Campaign for Better Care, will go beyond the statistics about chronic illness to put a human face on the issue, to mobilize and engage patients and families to fight for the care they want and need, and to bring the voice of the consumer to the center of the policy debate.

Cecili's background is in organizing, training, and researching on a variety of human rights and social justice topics including healthcare, poverty, torture, and labor issues. Prior to joining the Campaign for Better Care, Cecili served as the Deputy Director of the Mid-Atlantic Regional Office of Amnesty International USA (AIUSA) where she oversaw activist training and human rights education activities in the region. In this role, she served staff lead for the annual Regional Conference and the Human Rights Education Service Corps program and field consultant for the Individuals At Risk and Counter Terror with Justice campaigns. Prior to joining the staff at AIUSA, she served as a volunteer Mexico Country Specialist for nearly 7 years, researching human rights violations in Mexico and designing and implementing campaign strategies. Previously, Cecili held the role of High Burden Country Project Associate on the Global Tuberculosis Project at RESULTS Educational Fund and, prior to that, as the Workers' Compensation Research Associate at the National Academy of Social Insurance. Cecili lives in the Washington, DC area with her husband and daughters.

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Appendix E – References

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Appendix F – Background on the Organizations and Acknowledgments

About The SCAN Foundation (www.thescanfoundation.org)

The SCAN Foundation is an independent, not-for-profit charitable foundation dedicated to long-term services and supports that keep seniors self-sufficient, at home and in the community. As the only foundation with a mission focused exclusively on long-term care, The SCAN Foundation is taking action to develop and support programmatic and policy-oriented recommendations and solutions that address the needs of seniors and influence public policy to improve the current system.

About The Center for Technology and Aging (www.techandaging.org)

The Center for Technology and Aging is devoted to helping California and the nation more rapidly implement technologies that improve home and community-based care for older adults. Through research, grants, public policy involvement, and development of practical implementation tools, the Center serves as a resource for all those seeking to improve the quality and cost-effectiveness of long-term care services. The Center was established in 2009 with a generous grant from The SCAN Foundation and is located at the Public Health Institute in Oakland, CA.

About the Public Health Institute (www.phi.org)

The Public Health Institute (PHI) is an independent, nonprofit organization dedicated to promoting health, well-being and quality of life for people throughout California, across the nation and around the world. As one of the largest and most comprehensive public health organizations in the nation, PHI is at the forefront of research and innovations to improve the efficacy of public health statewide, nationally and internationally.

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We would like to thank all the panelists who participated in this rich and thought-provoking discussion, without whose contributions this report would not have been possible. We would also like to thank the facilitator of the expert panel, Dr. Molly Coye, Senior Advisor to the Public Health Institute.

The SCAN Foundation Program Officer for this initiative is Erin Westphal. This event and report were prepared by The Center for Technology and Aging. Contributors include Ange Wang, Andrew Broderick, David Lindeman, Lynn Redington, Valerie Steinmetz, and Margaret Whelly.

The SCAN Foundation Technology Summit:
**Enhancing Social Action for
Older Adults through Technology**

Expert Panel Report

Prepared by:
The Center for Technology and Aging

