

# Community Engagement Toolkit

Ensuring older adults inform a National Plan on Aging



NATIONAL PLAN ON AGING COMMUNITY ENGAGEMENT COLLABORATIVE:



SUPPORTED BY:



# ACL Toolkit Overview

## Introduction

Today, more than 55 million people in the United States are 65 years or older. They represent over 16 percent of our country's population, and their numbers will continue to grow rapidly over the next 30 years. This trend gives us much to celebrate, as older adults contribute to our society in countless ways. Through leveraging their wisdom, perspective, and experience, older adults serve as the backbone of many community programs that depend upon volunteers, accounting for one-third of the total number of volunteer hours serve in the U.S. in 2021. They care for grandchildren, in many cases making it possible for the children's parents to work and provide support that other depend upon to continue to live independently. They also contribute significantly to our economy—nearly 20 percent of people aged 65 and older are employed.

At the same time, this demographic shift demands thoughtful, intentional planning and action to improve the aging experience for the older adults of today and tomorrow. To address this need, the Interagency Coordinating Committee on Healthy Aging and Age-Friendly Communities (ICC), which is led by the Administration for Community Living and supported by 18 federal agencies, is leading the development of a national plan on aging. As a first step, the ICC released ["Aging in the United States: A Strategic Framework for a National Plan on Aging"](#) in May 2024 to spark dialogue and generate input - from across all sectors, and most important, from older adults themselves - to inform the national plan.

Our ambitious vision is an America that values older adults, embraces aging, and recognizes that all people have the right to live with dignity, to make their own choices, and participate fully in society. We want to be a nation that prioritizes independence, inclusion, well-being, and health across the lifespan. It will take all of us to make this ambitious vision a reality.



Mobile, AL

## About the Community Engagement Toolkit

This toolkit is designed to support community partners in engaging with older adults to collect their input and to support peer-to-peer conversations among older adults.

This toolkit is made possible by the support of the National Plan on Aging Community Engagement Collaborative, which is a public-private partnership between the ICC and The John A. Hartford Foundation, The SCAN Foundation, and West Health. The Collaborative helps to ensure that the voices and perspectives of older adults and community partners are central to the ICC's work and serves as a critical bridge to the community. The Collaborative has leveraged the expertise of the [Public Policy Lab](#) to inform this toolkit and to promote human-centered engagement that advances pro-aging values.



Charleroi, PA

### In this toolkit, you'll find:

- Background about the Strategic Framework for a National Plan on Aging and a corresponding fact sheet
- Tips for human-centered engagement that advances pro-aging values
- Plain-language discussion prompts, worksheets, notetaking forms, and background related to the key aging issues addressed by the Strategic Framework:
  - Age-Friendly Communities
  - Coordinated Housing and Supportive Services
  - Increased Access to Long-Term Services and Supports
  - Aligned Health Care and Support Services
- Instructions and tips for submitting partner-led feedback

## Background

Section 203(c) of the Older Americans Act of 1965 (Pub. L. 89-73, as amended through Pub. L. 116-131, enacted March 25, 2020) authorized the creation of the Interagency Coordinating Committee on Healthy Aging and Age-Friendly Communities (ICC) to foster coordination across the federal government on core aging issues. The Secretary of the Department of Health and Human Services delegated authority to oversee and administer ICC operations to the Assistant Secretary for Aging and Administrator of the Administration for Community Living (ACL).

The ICC was funded for the first time in fiscal year 2023, and 18 federal agencies are now working in partnership to develop a National Plan on Aging which will be informed by efforts related to this Community Engagement Toolkit.



Charleroi, PA



Charleroi, PA



Washington, D.C.

The **human-centered approach** for engaging with the community uses both qualitative and ethnographic methodologies to understand the experience of our participants from their point of view. The approach does not focus on statistical representation, rather seeks to understand diverse perspectives to inspire interventions that meet people's needs.



Washington, D.C.

## TIPS ON CONDUCTING HUMAN-CENTERED COMMUNITY ENGAGEMENT AND ADVANCING PRO-AGING VALUES

- Provide an **introduction** and **agenda** for how the engagement will go.
- Encourage people to speak from and about **their own experiences**.
- **Ask follow-up questions** as needed to understand not just what participants think should change, but **how their experience might be different in a different context or situation**. What is the cost or impact to them as an individual?
- **Strike a balance between allowing for what seems like digression**—because there might still be a meaningful quote or perspective shared that you hadn't considered—and reining participants back to the topic at hand, while **validating that you have heard what they said** and think it's important.
- If you don't get responses to every prompt every time, it's okay.
- **Communicate to participants about how their information will be used**, shared, and stored. If possible, collect consent prior to the sessions.
- When possible, **compensate your participants** for their time.
  - Follow [ReFraming Aging's Communication Best Practices Guide](#) to incorporate research-based language **that promotes inclusivity and is free of age bias**.
  - Share printed copies of trusted resources to support physical and mental health, well-being, and engagement as we age. This may include 211, a national information and referral services, and 988, the suicide prevention and crisis lifeline.
  - Recognizing that older adults use different language and terminology than government and policymakers, this toolkit translates the domains found in the Strategic Framework into plain language topics of discussion with older adults.

## How to Use

Regardless of the engagement format, we recommend providing background information about the Strategic Framework for a National Plan on Aging and highlighting the importance of hearing directly from the populations most impacted by its development. The tools in this document are provided to help this engagement:

- Background about the Strategic Framework for a National Plan on Aging and a corresponding fact sheet
- Tips for human-centered engagement that advances pro-aging values
- Plain-language discussion prompts, worksheets, notetaking forms, and background related to the key aging issues addressed by the Strategic Framework:
  - Age-Friendly Communities
  - Coordinated Housing and Supportive Services
  - Increased Access to Long-Term Services and Supports
  - Aligned Health Care and Support Services
- Instructions and tips for submitting partner-led feedback  
For community-partner led engagements that address all domains, we encourage partners to re-sequence the toolkit to begin by asking older adults about their living situations, healthcare, and other services before diving into the multi-faceted topics covered by age-friendly communities.

### Using the Discussion Guides, Worksheets and Notes Templates for Each Domain

The worksheets and discussion guides are not designed to stand alone to collect insight and perspective. They are designed to stimulate ideas and help quickly move into productive and focused

conversation about the topics at hand as guided by the facilitator using the discussion guide.

Please share with all participants that their feedback is anonymous and instruct them to only use the worksheets if they are helpful—we don't want to put pressure on anyone to write down every thought. It is important to not use the worksheets as stand-alone documents because some individuals may have greater physical ability to write and greater facility with words and with English than others. When engaging with participants speaking other languages, translate the worksheets beforehand. Prior to using the discussion guide, review the content and update the talking points to suit your context.



Charleroi, PA

## Starting The Conversation

We recommend sharing an agenda, goals, and what to expect of the engagement regardless of the method of engagement. For engagements that address all domains, we encourage partners to re-sequence the toolkit to begin by asking older adults about their living situations, healthcare, and other services (Domains 2–4) before diving into the multi-faceted topics covered by age-friendly communities (Domain 1).

### Example Facilitation Prompts & Responses

- “What I hear you saying is that [brief summary of need or challenge]. Is that right?”
- “Wow, that is really interesting. I’m wondering if anyone else here has experiences with [topic]?”
- “What you’re sharing is really rich, and I want to be able to capture it all, but I also want to make sure we get to hear from other folks—could you write it all down on the back of the worksheet? Then we’ll definitely be able to review all of it later.”
- “I want to make sure we get to hear from some other people, but if there’s time, we can come back to you, okay?”

### Welcome

Introduce the participants to the agenda, goals, and what to expect in the session. You can include topics such as:

- Name introductions
- Goals for the engagement
- Background about the Strategic Framework for a National Plan on Aging
- The Strategic Framework’s vision and values

### Sample Welcome Script

Welcome, everyone! Everyone please have a seat, make sure you have a pen and your packet.

My name is [X], and I’m going to be facilitating our conversation today. I’ll let our notetaker and other listeners introduce themselves too. [Introductions].

We are here today to better understand what matters to you as you age and how we can better support your goals, not just here in [enter location], but across the country.

We came to hear from you as we all work to create a National Plan on Aging.

You know firsthand the experience of aging, the opportunities, and barriers you face in everyday life, and challenges you may face when trying to live where you want to live.

We want to hear about the services and supports that are working, and those that are not.

We hope to spark honest conversation. We want to gather your feedback so we can move closer to developing a National Plan on Aging that can help everyone age well with dignity and preserve a person’s choice about where they live and what community they call home. There are no wrong answers, and we gain so very much from listening to your lived experiences and what your hopes, dreams, and fears are as you age.

# **Discussion Guide & Worksheets →**



## Sample Script: Shared Vision and Values

The vision for the national plan on aging is an America that values older adults, embraces aging, and recognizes that all people have the right to live with dignity, make their own choices, and participate fully in society. We want to be a nation that prioritizes independence, inclusion, well-being, and health across the lifespan.

I want to ask that we keep three crosscutting values in mind as we work today:

- The first is a primary **focus on individual experiences** which means that the preferences, needs, and voices of each older adult must drive the services and supports that enable each person to live the life they want.
- The second is **inclusion**: All people regardless of age, disability, race, and other life experiences, should be supported to live independently and participate fully in their communities.
- The third is **respect**: All people have the right to live their lives with dignity and respect, free from abuse of any kind.

Thank you for keeping these three crosscutting values at the center of today's discussions.

## Icebreaker

If possible, begin the conversations with an icebreaker to give participants a chance to introduce themselves to each other. The worksheets include a list of options for icebreaker question that participants can choose from.

### Sample Icebreaker Script

Okay, now we're going to do a very short icebreaker to get to know each other. Participants will need to partner up for this, so please turn to someone next to you. Pick one of the questions there under Icebreakers and answer it with your partner.

## Conversation Introduction

Introduce the participants to the worksheets and how the discussion will go. Share how they will be using the worksheets to help create fodder for discussion and walk the participants through the different sections of the session.

### Sample Introduction Script

We did that icebreaker to loosen us up and start us off sharing about ourselves and our lives. Now we're going to move into one or more of the core domains that are reflected in the Strategic Framework for a National Plan on Aging. For each topic we cover, **there will be three parts to what we do**:

1. First, we'll take a couple minutes to do a little reflection and jot down some initial thoughts in the worksheet that's in your packet.
2. Next, we will ask participants to share their responses to the worksheet.
3. Then, what's most important to our conversation today, we will leverage the discussion guide to support dialogue about how services might help to better address the vision you have for aging now and in the future.

**The worksheet is just to get you thinking so you can talk**, and they are anonymous. **So, if you have a lot you want to communicate, please write it all down. But if you don't want to write a lot down, that's fine too**—the worksheet is mostly to get you thinking before we ask you to share.

## Topic 1: Participating in Your Community

People of all ages benefit when they live in places that are designed to encourage health, well-being, engagement, and connection. Age-friendly communities are responsive, healthful, equitable, engaging, active, and respectful. These communities also feel safe to residents which may promote mental health and well-being. By creating these environments, older adults and people of all ages can maintain their independence and enjoy a higher quality of life as they age.

The Strategic Framework for a National Plan on Aging has the aspirational goal that **all older adults live in communities that respect and include them and are designed to encourage health, well-being, engagement, and connection.** In order to make this broad aspirational goal a reality, the Strategic Framework calls for a focus on purpose and engagement, social connection, accessibility and universal design, transportation, economic and financial security, employment, and age-friendly health systems.

### Facilitator Note

Focus your probing on what we are trying to understand:

*In what ways do older adults access and participate in their local communities? What enables and prevents them from accessing and participating in their local communities in meaningful and affordable ways? What might improve their access and participation?*

### Sample Script

- **Part 1 (5 minutes):** This topic is Participating in Your Community. Take 5 minutes to read through and jot down some thoughts on the worksheet.
- **Part 2 (8 minutes, 3-4 participants):** [Participant's name], can you share some of the things you wrote on your worksheet?
  - Thanks for sharing that, [participant's name]. Can I get a show of hands, does anyone else [have that experience]?
- **Part 3 (7 minutes):** Now we want to have some discussion, so raise your hand if you want to respond.
  - When you think about the things that make you less likely to interact with people and places in your local community, what might make it easier for you?
  - What would you like to do in your local community that you're not able to do?

## Worksheet 1: Participating in Your Community

1. Circle three things that **make you more likely to interact** with the people and places in your local community, now or in the future:

|  |   |
|--|---|
| Having access to public space              | Having access to social gatherings/places |
| Belonging to a group (church, club, etc.)  | Feeling safe outside                      |
| Having access to volunteer programs        | Having friends and family                 |
| Having good, suitable job opportunities    | Having access to mentorship opportunities |
| Having access to educational opportunities | Feeling healthy/able                      |
| Having access to affordable transportation | Being able to use transportation          |
| Being able to walk places                  | Feeling welcome                           |
| Having reliable sources of information     | Having financial support/security         |

Other:

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2. Circle three things that **make you less likely to interact** with the people and places in your local community, now or in the future:

|   |  |
|---|--|
| Lacking access to public spaces             | Lacking access to social gatherings/places |
| Lacking social connections                  | Feeling unsafe outside                     |
| Lacking access to volunteer programs        | Having responsibilities at home            |
| Lacking good, suitable job opportunities    | Lacking mentorship opportunities           |
| Lacking access to educational opportunities | Experiencing health issues/concerns        |
| Lacking access to affordable transportation | Being unable to use transportation         |
| Feeling limited by physical capacity        | Feeling unwelcome                          |
| Lacking awareness                           | Lacking financial support/security         |

Other:

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## Topic 2: Where You Live

Nearly all older adults want to stay in their homes as they get older, but many struggle to find and/or keep homes that are affordable, easy to move around in, and good quality. Unfortunately, one out of every six older adults spend more than half of their money on housing and many middle-income older adults with multiple chronic conditions will not be able to pay for the housing and help they need to live on their own. To solve these issues, we need to make sure homes for older adults are affordable, accessible, and safe. It is also important to provide older adults with services like installing new home features (e.g., grab bars, ramps), help with personal care, and transportation. By combining good housing with helpful services, we can help older adults stay in their homes longer and more comfortably.

The Strategic Framework for a National Plan on Aging has the aspirational goal that **all older adults have access to housing and the services they need to maintain their independence at home and thrive in their community**. In order to make this broad aspirational goal a reality, the Strategic Framework calls for a focus on housing stability, affordable housing, accessible quality housing, and preventing and addressing homelessness.

### Facilitator Note

Focus your probing on what we are trying to understand:  
*What kinds of housing do older adults live in? What enables and prevents them from living where and with whom they wish to live? What might help them do so more easily?*

### Sample Script

- **Part 1 (5 minutes):** This topic is Where You Live. Take 5 minutes to read through and jot down some thoughts on the worksheet.
- **Part 2 (8 minutes, 3–4 participants):** *[Participant's name]*, can you share some of the things you wrote on your worksheet?
  - Thanks for sharing that, *[participant's name]*. Can I get a show of hands, does anyone else *[have that experience]*?
- **Part 3 (7 minutes):** Now we want to have some discussion, so raise your hand if you want to respond. Think about your living situation—I. What changes would make to your home, or who you live with, or your community, to support you in living independently at home? These don't have to be changes you can make on your own—they might be things you need the government or other people to help you with.

## Worksheet 2: Where You Live

### Today

1. Circle descriptions of the home you live in:

|                 |                           |                 |
|-----------------|---------------------------|-----------------|
| One-story house | House with stairs         | Apartment       |
| In-law suite    | Mobile home               | Boat            |
| Senior housing  | Independent living        | Assisted living |
| Nursing home    | Shelter/temporary housing |                 |

Other:

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2. Circle descriptions of who you live with:

|                    |                           |                              |
|--------------------|---------------------------|------------------------------|
| Live alone         | Child/children            | Grandchild/<br>grandchildren |
| Spouse/<br>Partner | Other family<br>member(s) | Roommate                     |
| Pet(s)             | Other:                    |                              |

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### As you age

3. Describe what your home will need to support you in living independently as you age?:

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4. Circle 2-3 factors that most influence your ability to live in your home as you age:

|                             |                               |                               |
|-----------------------------|-------------------------------|-------------------------------|
| Cost/financial assistance   | Transportation                | Walkability                   |
| Services/<br>programs       | Friends, family,<br>neighbors | Someone taking<br>care of you |
| Safety                      | Physical ability              | Distance from<br>something    |
| Devices or home<br>features | Other:                        |                               |

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5. What is most important to you about where you live now? How might your home be different in ten years?

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## INCREASED ACCESS TO LONG-TERM SERVICES AND SUPPORTS

### Topic 3: Assistance with Your Everyday Life

Most Americans do not realize how likely they are to develop a disability and need long-term services and supports (LTSS) in the future. For example, about one in five of all adults (22%) will have a disability lasting for more than five years. Older adults and their family caregivers need easy access to affordable, high-quality services and supports that help them stay independent and meet their goals. By improving the availability, affordability, and quality of services like in-home care and adult day care, we can help older adults maintain their independence and well-being while also easing the burden on family caregivers.

The Strategic Framework for a National Plan on Aging has the aspirational goal that **all older adults can easily access affordable, high-quality services and supports that promote their independence and goals**. In order to make this broad aspirational goal a reality, the Strategic Framework calls for a focus on: paid and unpaid caregiving, whole person health financing, elder justice, and person-centered access systems.

#### Facilitator Note

Focus your probing on what we are trying to understand:  
*What kind of assistance do older adults need in completing everyday tasks or self-care? What enables them and prevents them from accessing that assistance? What might help them access it more easily?*

#### Sample Script

- **Part 1 (5 minutes):** This topic is Assistance with Your Everyday Life. Take 5 minutes to read through and jot down some thoughts on the worksheet.
- **Part 2 (8 minutes, 3-4 participants):** [Participant's name], can you share some of the things you wrote on your worksheet?
  - Thanks for sharing that, [participant's name]. Can I get a show of hands, does anyone else [have that experience]?
- **Part 3 (7 minutes):** Now we want to have some discussion, so raise your hand if you want to respond.
  - What kind of assistance might you want in the future to take care of yourself or your home?
  - What might help you get more of the assistance you need?

### Worksheet 3: Assistance with Your Everyday Life

In the last year, has anyone helped you with everyday tasks or caring for yourself at home? This could be a family member, a friend, or a caregiver who is paid to assist you.

#### If yes

1. Who are they?

|                    |                  |                           |
|--------------------|------------------|---------------------------|
| Spouse/<br>partner | Child/grandchild | Other family<br>member(s) |
| Friend             | Professional     | Other:<br>_____           |

2. What do or did they help you with?

|               |                |                 |
|---------------|----------------|-----------------|
| Medical tasks | Cooking/eating | Transportation  |
| Hygiene       | Chores         | Other:<br>_____ |

3. What is most helpful about what they did or do for you?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. How could they support you better?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### If no

What help could you use with everyday tasks in your home life or in caring for yourself as you age?

|               |                |                |
|---------------|----------------|----------------|
| Medical tasks | Cooking/eating | Transportation |
| Hygiene       | Chores         |                |

Other:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### Either way

What challenges are you concerned about when having someone help you (e.g. fraud, scams, abuse, other)?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Topic 4: Supporting Your Health and Well-Being

As people get older, they need more health care and help from others. However, older adults may have trouble accessing the services they need. For example, almost 14 million adults aged 60 and older qualify for the Supplemental Nutrition Assistance Program (SNAP) yet have not signed up. To help older adults stay healthy, we need to combine medical care with other important services such as nutrition, transportation, and social support. By aligning health care and supportive services, organizations can better address all aspects of older adult's health and well-being.

The Strategic Framework for a National Plan on Aging has the aspirational goal that **all older adults have access to housing and the services they need to maintain their independence at home and thrive in their community**. In order to make this broad aspirational goal a reality, the Strategic Framework calls for a focus on: Benefits Access, Optimizing Health, Well-Being, and Functioning, and Aligning Health and human services.

### Facilitator Note

*What healthcare services and related social programs do older adults use? In what ways do these services and programs benefit and detract from their health, well-being, and functioning? What might make these programs and services more effective?*

### Sample Script

- **Part 1 (5 minutes):** This topic is Supporting Your Health and Well-being. Take 5 minutes to read through and jot down some thoughts on the worksheet.
- **Part 2 (8 minutes, 3-4 participants):** *[Participant's name]*, can you share some of the things you wrote on your worksheet?
  - Thanks for sharing that, *[participant's name]*. Can I get a show of hands, does anyone else *[have that experience]*?
- **Part 3 (7 minutes):** Now we want to have some discussion, so raise your hand if you want to respond.
  - How could the services or programs you receive be improved?
  - What kind of services might you want or need in the future?



## Worksheet 4: Supporting Your Health and Well-Being

1. Circle services and programs you currently participate in that support your health and well-being:

|                                     |                                  |                                      |
|-------------------------------------|----------------------------------|--------------------------------------|
| SNAP/<br>Food stamps                | Home delivered<br>meals          | Group meals (e.g.,<br>senior center) |
| Exercise<br>programs                | Chronic disease<br>programs      | Food bank                            |
| Help coordinating<br>/ getting care | Help with Benefits<br>navigation | Transportation to<br>appointments    |
| Medicaid                            | Medicare                         | Fall prevention<br>programs          |
| Vaccination<br>drives               | Other:<br>_____<br>_____         |                                      |

2. Circle visits that support your health and well-being:

|                        |                                |                 |
|------------------------|--------------------------------|-----------------|
| Doctors                | Nurse<br>Practitioners         | Nurses          |
| Physical<br>therapists | Mental health<br>professionals | Peer counselors |
| Case workers           | Nutritionists                  |                 |

Other: \_\_\_\_\_

3. In what ways do these services, programs, and visits positively impact your health and well-being? (Feel free to draw arrows from things you circled)

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4. Who connects you to these services, programs, and visits?

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5. What challenges do you experience in receiving these services or programs?

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# Listening Session Notes for Notetaker

Your Name \_\_\_\_\_

Group Number \_\_\_\_\_

Date \_\_\_\_\_

**Tips:**

- Keep comments from different participants separate and framed as their perspective, not fact.
- Write in third person, avoid using names or personally identifying information.

| <b>Data Point</b> | <b>Topic Area</b> (match with worksheet) | <b>Additional Insights</b> (optional) |
|-------------------|--|---------------------------------------|
|                   |  |                                       |
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## Instructions and Tips For Submitting the Feedback You Collect

Following your engagement, please submit your key themes from your discussions related to the core topics in the Strategic Framework. Feedback can be submitted through a short online survey available at [westhealth.org/nationalplanonagingsurvey](https://westhealth.org/nationalplanonagingsurvey), including through the submission of a word document that may include an appendix with the key themes and important details related to the engagement. You also can upload a Microsoft Word document that summarizes what you collected.

Please also invite older adults to continue sharing their valuable insights and feedback on the Strategic Framework. Their perspectives are essential in shaping a comprehensive approach to address the needs and challenges faced by older adults in communities nationwide and we want to ensure their voices are heard. There are two survey options - one for individuals/older adults and one for respondents representing an organization.

We strongly encourage all community partners to utilize the discussion guides, worksheets, and notes templates for each domain as they summarize feedback received to submit to the community engagement feedback portal.

Your support in facilitating this process is greatly appreciated and will help ensure the needs of older adults are effectively represented.

### **Here are some helpful tips to support your feedback submission:**

- Please share your organization's name and the date and location of the community-partner led engagement
- Please share the number of participants and helpful descriptions (e.g., older adults, caregivers, people with disabilities, age-range)
- Please include any relevant demographic information
- Please provide key themes identified for each of the core topics that your engagement covered:
  - Age-Friendly Communities
  - Coordinated Housing and Supportive Services
  - Increased Access to Long-Term Services and Supports
  - Aligned Health Care and Supportive Services
- Please include any worksheets or notes as an appendix to your submission.