

Age-Friendly Ecosystem Collaboration Workshop

PART 1: GETTING STARTED



Age-Friendly Ecosystem Collaboration Workshop Guide

This Facilitator’s Guide is designed to provide clear, practical instructions for convening community partners and leading your city/town, state or region toward a more connected, age-friendly future.

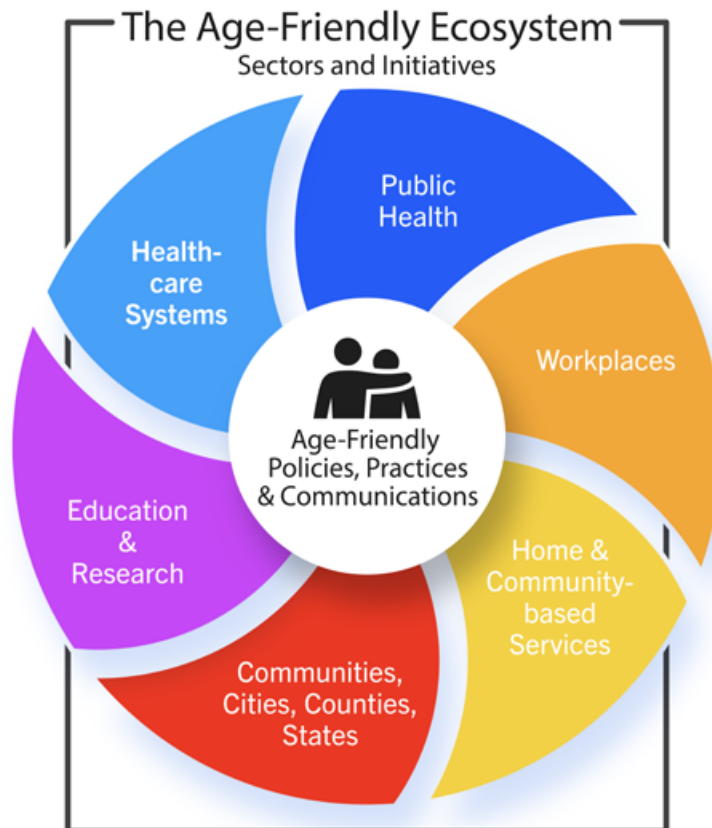
The guide outlines each step of the Age-Friendly Ecosystem Collaboration Workshop process, from preparation through follow-up, to help ensure that immediate goals, shared outcomes, and a sustainable path forward are achieved. It also offers tools and strategies to help facilitators strengthen relationships, identify priorities, and translate discussion into coordinated action across sectors.

• We are proud to share this Age-Friendly Ecosystem (AFE) Collaboration Workshop Guide, designed to help communities strengthen partnerships and advance age-friendly goals through a participatory process. We invite you to join other communities using this collaborative approach to build lasting cross-sector connections and actionable plans.



Part 1: Getting Started

- A** Establish a core team
- B** Define workshop objectives
- C** Identify a Topic for the workshop
- D** Pre-Workshop Logistics





Getting Started

A Build a Core Planning Team

This pre-workshop phase should focus on building relationships across as many Age-Friendly Ecosystem sectors as possible and engaging other partners whose collaboration will be essential for implementing community-driven solutions. Bringing together leaders from different sectors and perspectives will be crucial to the process of turning workshop ideas into real community solutions. These team members will work together to:

Set goals for the workshop

- Encourage and invite partner participants
- Secure funding to support the event
- Design an effective gathering and post-event follow up
- Share results and next steps with the community

Consider including representatives from:

- Local public health departments
- Area Agencies on Aging
- Disability services agencies
- Health care systems or local clinicians
- Local universities
- Local businesses or chambers of commerce
- Community-based organizations (like the YMCA)
- Faith-based organizations

SUGGESTION!

Include one or more older adults on your planning team. Their perspective is essential.

B Define Workshop Objectives

The first task of the core planning team is to identify the intended focus or issue area and desired outcomes of the workshop. These guiding questions will help shape the workshop's design and ensure that it meets local needs:

- Will the Workshop build upon existing initiatives such as your State's Master (or Multisector) Plan for Aging, Age-Friendly Community (or State) plans, public health improvement strategies, health system transformation efforts, housing or transportation plans, or other community development efforts?
- Will the Workshop explore the broader community landscape, or will it focus more narrowly on a specific neighborhood, agency, organization, sector, or campus—deepening collaboration within one area of the local Age-Friendly Ecosystem?
- What are the most pressing needs in your community?
- What areas are your partners already working on that you could enhance or expand upon?

C Identify a Topic for the Workshop

Once the core planning team is established and workshop objectives defined, the next important strategic activity is to work with the planning team to identify an issue to address: a challenge or focus that will guide the group's collaboration. Some groups may refer to this as a main area of interest or social impact goal.

This focus should reflect the issue or opportunity the group most wants to address. It serves as a unifying call to action and helps ensure that everyone's actions and ideas connect toward a common purpose.



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Examples of Shared Goals:

- Expand affordable and accessible housing options
- Promote equity in access to healthcare
- Increase access to technology and digital services
- Improve social engagement opportunities for older adults

Leveraging your State's Multisector Plan for

Aging: If your State has developed or is developing a Multisector Plan for Aging (MPA), consider choosing your Shared Goal from one of the MPA objectives.

- Click [HERE](#) to view a map of states with existing MPAs or MPAs in development.
- These plans are based on aspirational goals or social impact priorities (such as promoting healthy aging, addressing equity, supporting caregivers, and strengthening workforce and housing systems.)
- Referencing the MPA helps ensure that your community's efforts connect to broader statewide strategies and can open doors to potential partnerships and funding streams.
- The MPA may include priorities that your collaboration could support or help to operationalize while demonstrating alignment with state-level goals.



D Pre-Workshop Logistics

Once your core planning team has decided on the strategic direction of your event, you are ready to dig into logistics. Here is a list of important considerations with related templates and tools to help make this process as streamlined as possible.

- Develop your Workshop Invitation List: (download a sample invitation list [here](#)) The Workshop should include a broad and diverse group of participants representing the variety of sectors and organizations that represent the community. Individuals who have the capacity to influence systems as well as those whose lived experience should also be included.

SUGGESTION!

Suggestion! Keeping your Workshop participants to 20 people will help to ensure diverse perspectives but remain manageable.

Consider inviting participants who:

- ▶ Work within or lead organizations across the six Age-Friendly Ecosystem sectors — public health, local government, health care, higher education, aging services, and employers/workplaces.
- ▶ Bring lived experience as older adults, caregivers, or family members.
- ▶ Have authority to shape policy, allocate resources, or drive collaboration.
- ▶ Represent diverse neighborhoods, communities, and populations that experience aging and caregiving differently.



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- Identify the Workshop format based on the facilitator’s experience, resources and core team capacity.
 - ▶ One half-day (3.5–4 hours) session, good for smaller communities or new collaborations, or
 - ▶ Two half-day sessions (4 hours each) spaced one to two weeks apart, good for communities that wish to build momentum across sessions.
- Start planning your project, including assigning tasks among the core planning team. A [Project Planning Template](#) can be downloaded to assist with planning. A [Sample Agenda](#) can also be downloaded here.
- Create a project timeline:
 - ▶ 3-6 months out: select and hold the date
 - ▶ 2 months out: generate a list of potential stakeholders and confirm facilitators
 - ▶ 1-3 months out: develop outreach materials
 - ▶ 6-8 weeks out: send the save-the-date invitations
 - ▶ 4-6 weeks out: follow up with formal invitation
 - ▶ 2-3 weeks out: send pre-workshop materials
- Consider curating a selection of pre-workshop materials to share with participants ahead of time. These may include information that reflects the current landscape of aging and community supports. The goal is to ground the workshop in a shared understanding of the community’s demographic trends, existing strengths, and system challenges, ensuring that discussions build on what is already known and experienced. Depending upon selected areas of focus, these may include:
 - ▶ The state’s [Multisector Plan for Aging](#) if there is one (the core team should review it carefully before the Workshop).
 - ▶ Demographic data on older adults and caregivers (e.g., population trends, living arrangements, income levels, transportation access).
 - ▶ Local Age-Friendly or Livable Community assessments, state or community health improvement plans, housing studies, transportation analyses, etc.
 - ▶ Stories, quotes, or case examples that illustrate lived experiences of aging and caregiving in the community.

TIPS FOR FACILITATORS

- **Watch the clock and control your agenda. Flexibility balanced with time management will result in an effective workshop.**
- **Use a “parking lot” to save good ideas that may lack relevance to the focused area.**
- **Ensure all voices are being heard, including from partners of all sizes and capacities. Watch for power imbalances and ensure no one is overlooked.**