



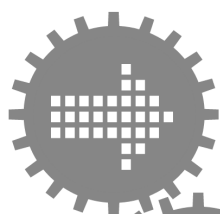
Aging in Place: Your Home, Your Community, Your Choice Facilitation Guide

content created and compiled by
Aging in Community Leadership Team of the New River Valley, Virginia



2022 Update

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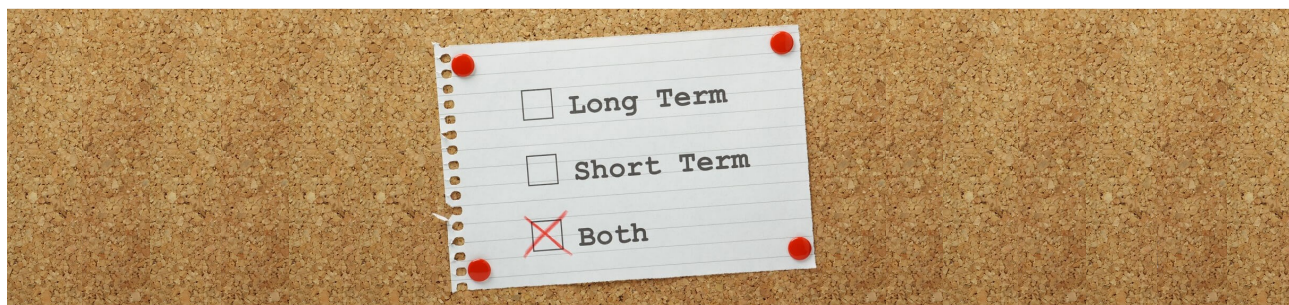


FACILITATION GUIDE: INTRODUCTION & BACKGROUND

First off, here's a hearty thank you! You've stepped up to help others in your community proactively plan for aging in place by hosting a workshop. This facilitation guide is designed to help you lead a group of any size through the aging in place planning workbook.

The majority of older Americans both desire and intend to live in their home for as long as possible. The decision to *age in place* may seem like an obvious and logical choice. After all, most people have invested time and money into their home and often have fond memories of the time they have spent there with family and friends. Our home connects us to people important to us, and gives us a sense of place and belonging in our community.

Aging in place in a safe and well-maintained home and in familiar surroundings has many benefits. It helps improve personal health, social interactions, and connections to community resources and usually enables people to enjoy a better quality of life. Yet, **aging in place is more than just planning to stay in one's home.**



Aging in place requires an examination of many different aspects of life including housing, health and well-being, finances, transportation, and networks of connection and support. Even though many older Americans believe they will be able to manage the changes that might occur as they age, **approximately 70% will require help with their care at some point, for an average of three years.** Helping people think about and plan for both their current **and** future needs will increase the likelihood of them maintaining independence at home and their ability to age in place.

Never fear - **you DO NOT need to be an expert** on aging or any of the topics in the workbook to host a successful workshop. In fact, we have designed this **facilitation guide** to walk you through all the steps. As shown in the table of contents at left, first we'll explore the structure of the participant workbook itself, then we'll walk you through the basics of planning and hosting an engaging, effective workshop. At the close of this guide, we've compiled an array of additional resources, forms, and templates which are designed to help you and your participants before, during, and after the workshop. Let's get started!

STRUCTURE OF WORKBOOK: TOPIC CHAPTERS

FIVE INTERRELATED TOPICS

The Aging In Place Workbook is built around **FIVE KEY TOPICS** which aging experts have identified as the critical factors that people should consider and plan for to successfully age in place. As you facilitate a workshop, it's important to encourage your participants to consider how these topics can interrelate or impact one another.



To illustrate how these topics can be interconnected, here is a quick example:


Harriet lives alone and has started to become a bit unsteady on her feet (**HEALTH & WELLNESS**). The home she has lived in for years has two stories, with the master bedroom upstairs and the washing machine in the basement (**HOUSING**). Carrying laundry up the stairs one day, she loses her footing and experiences a serious fall that results in a broken hip (**HEALTH & WELLNESS**), and major medical bills (**PERSONAL FINANCE**). After she is discharged from the hospital, she is unable to drive herself to physical therapy (**TRANSPORTATION**, **HEALTH & WELLNESS**). Although she is able to get occasional rides from neighbors and family members, she often relies on a taxi service (**TRANSPORTATION**) during her extended recovery period. This adds an additional financial burden on top of the unexpected medical bills associated with her fall injury (**PERSONAL FINANCE**), which leads her to limit her trips for regular errands and social outings (**CONNECTION & GROWTH**). In the end, her recovery period takes a full six months, during which time Harriet isn't able to do the things she previously enjoyed like volunteering at the local library and walking with friends (**CONNECTION & GROWTH**, **HEALTH & WELLNESS**), nor is she able to manage daily housekeeping and home maintenance tasks (**HOUSING**).

STRUCTURE OF WORKBOOK: COVERING THE KEY POINTS

KEY POINTS

Planning for aging in place is not as easy as it might seem. Most people understand and even expect the aging process to include some changes: in physical strength, mobility, vision, hearing, and in some cases to cognitive function. Yet very few people are able to recognize the impact of these small, incremental changes as they creep up. Ignoring such changes can threaten both independence and well-being. This is why proactive planning for aging in place is critical.

To help participants think about aging in place and engage with the workbook, we have begun each chapter with three **KEY POINTS** that relate to that specific topic. These are designed to expand participants' thinking from their current circumstances to what might change for them in the future and what they need to think about and plan for to extend their independence.



HOUSING

Planning for Aging In Place—Key Points on Housing:

#1 THINK ABOUT WHAT YOU REALLY WANT
Before starting this section, take some time to consider what you really want as you get older since your housing choice will play a big role in that decision.

- If you think your current house will keep you happy and fulfilled as you age in terms of proximity to family, friends, services, the outdoors, or whatever criteria you have, then consider what needs to be done for you to stay in the house.
- Alternatively, maybe you would prefer a home that requires less maintenance or yard work, is closer to family, is in a location that makes it easier to get around without a car, or is in a different climate.
- On the other hand, maybe you want a different type of housing where friends and neighbors support each other as they age such as a cluster of small homes with friends, a co-housing community, or some other type of shared housing. Options like this exists in the New River Valley but they are not yet common. Pursuing something like this may require you to reach out to others who share your vision to see if you can create the type of housing you want.

#2 BE PROACTIVE AND IDENTIFY RESOURCES
Identify the challenges that living in and maintaining your home will present over time and think about your capacity to meet those challenges if your physical or financial circumstances change. Deferred home maintenance can quickly snowball, threatening your health and safety, and even the habitability and durability of your home. It's also not uncommon for a surviving spouse to be unaware of monthly, seasonal and annual tasks their partner did to maintain the home and property. Use the seasonal home maintenance checklist provided in the appendix of this workbook as a guide, and/or create one tailored to your own home. Identify trusted resources for home maintenance and routine chores if you need them down the road. Remember, **planning always reduces cost and increases options.**

#3 EVALUATE ACCESSIBILITY & FALL HAZARDS - KNOW YOUR LIMITS
Fall prevention is a key factor in remaining in your home for as long as possible. According to the National Center for Injury Prevention and Control, falls are the number one cause of home injury, and studies suggest that a significant proportion of all falls are due to factors around the home that can be easily changed (for example, throw rugs that cause a tripping hazard). It's also important to consider housing accessibility issues before your mobility becomes limited or a traumatic event creates a crisis scenario where returning to your current home is no longer an option.

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Ultimately, these key points should help participants reflect on what is most important to them, acknowledge the realities that accompany aging, and emphasize that they have the opportunity right now to set themselves up to create the future they want for their later years.

We recommend spending a few minutes covering these key points before asking your participants to dig into the questions for each topic chapter.

We've developed **THREE OPTIONS** that you can use to present the key points. Select the one that you think will best meet the needs of your group.

- **NARRATIVE** at the beginning of each chapter
- a template **POWERPOINT** presentation
- short introductory **VIDEOS** for each topic area

The template PowerPoint and videos can be downloaded from the Aging In Place website and are further described on the following two pages.



PERSONAL FINANCE

Planning for Aging In Place—Key Points on Personal Finance:

#1: DEVELOP A CLEAR PICTURE OF YOUR POST-RETIREMENT FINANCES
How do you want to live in retirement? What kind of lifestyle do you want to have? Having a financial plan is crucial because it identifies your sources of income and expenses and establishes your retirement budget, based on your personal plan. The first step is preparing a balance sheet showing your assets and liabilities to determine your net worth (what you own minus what you owe). Knowing your net worth will help you develop the right strategy for your situation. The second step is to build a monthly budget based on what you think your actual non-discretionary and discretionary expenses are/will be in retirement. Even if you are already retired, having a plan helps you keep track of expenses and allows you to adjust your goals given certain events or changing circumstances. Remember, retirement will be more enjoyable if your income is structured to fit your lifestyle choices and if you have developed a retirement plan to protect the assets you have worked hard to acquire.

#2: GET ADVICE
Let's face it, retirement is a big life change. And to many, it can feel overwhelming to try to make sense of the complex financial decisions before them. Do I take my pension as a lump sum or an annuity? When should I file for social security? Should I pay off my mortgage? Is a reverse mortgage a good idea? How will my health insurance be handled during the bridge years between when I retire and Medicare eligibility? Do I still need life or long-term disability insurance? You may also not have the expertise, the time or the desire to actively plan and manage certain financial aspects of your life.

Don't be afraid to reach out to a financial expert who can help you answer your important questions. A financial expert can help you organize your finances, project the results of your savings and investments so you can see how well prepared you are for retirement, and help you make decisions about how to save and spend. Depending on your needs, you may want help from a financial planner, a tax advisor, or an attorney with estate planning expertise.

#3: CREATE AND SHARE KEY DOCUMENTS
Peace of mind is key for you as you age, but it is also incredibly important to your loved ones. Your children, spouse, other family, and friends will want to understand and honor your wishes near the end of your life. We often hear people say they do not want to be a burden to family and friends as they age, and having good records and documentation is key to accomplishing that goal. Questions you should be asking:

- Do I have the appropriate documentation?
- Is it up to date?
- Do my loved ones know where those documents are and how to access them?

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SUPPLEMENT TO THE WORKBOOK: COVERING THE KEY POINTS

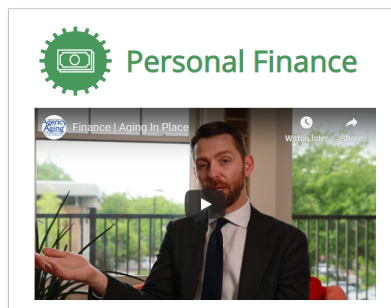
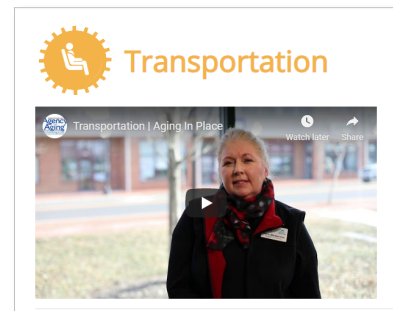
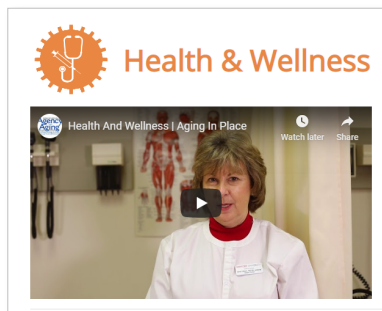
VIDEO SERIES

Video links are available here: <http://www.nrvaoo.org/aging-in-place/videos/>

To assist you in presenting the key points for each topic area in the workbook, we have created a set of short videos. The first offers a **GENERAL INTRODUCTION** to the topic of aging in place. We've also provided a **VIDEO JUST FOR FACILITATORS** that covers the basics of hosting a workshop and serves as a supplement to this guide.



We have also created five **TOPIC-AREA VIDEOS**. These offer a short introduction to each of the workbook chapters: Housing, Health & Wellness, Transportation, Personal Finance, and Connection & Growth. Each video features individuals with expertise in that field specific to aging. We invite you to use these videos as a way to cover the **KEY POINTS**. This will help frame each topic for your participants before asking them to engage with the questions in the workbook. Each video is fairly short with an average run time of 6 minutes.

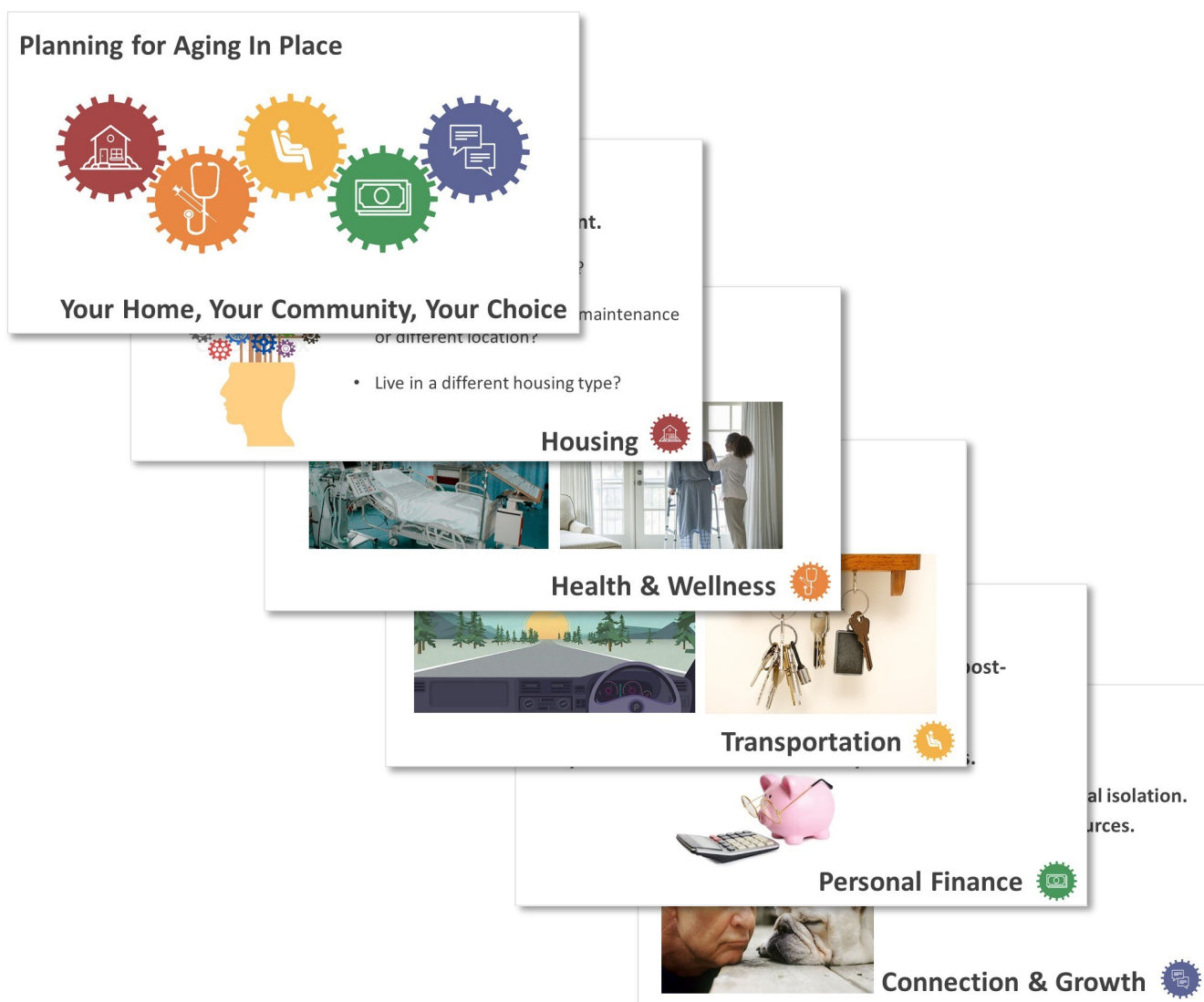


SUPPLEMENT TO THE WORKBOOK: COVERING THE KEY POINTS

TEMPLATE PRESENTATION

Editable PowerPoint is available here: <http://www.nrvaoo.org/aging-in-place/resources/>

As an alternative to the video series, we have also created a template PowerPoint presentation that you can use to frame and introduce each of the topics in the workbook. The template presentation comes with a suggested script that mirrors the **KEY POINTS** narrative in the participant workbook. Regardless of whether you choose to cover the Key Points by having your participants read them in their workbooks, using the video series, or showing the template presentation, we recommend that you set aside about **FIVE MINUTES** for this portion, so your participants start off with some context on each topic before they engage with the questions in the workbook.



STRUCTURE OF WORKBOOK: TOPIC CHAPTERS

SELF-ASSESSMENT QUESTIONS

Following the key points, each chapter includes sets of **QUESTIONS** that participants can use to assess both their current and potential future needs. Most of the questions require yes/no responses or ask users to “check all that apply”. Other questions are open-ended to elicit an answer more specific to their situation. There are no right or wrong answers. Participants are free to share their responses during group discussions if they feel comfortable, or keep them private.

In previous workshops, participants have reported that they found it useful to be given time to discuss the issues raised by the questions. Be sure to incorporate time for table (or whole group) discussion for each topic area into the workshop agenda.



HOUSING

Choice of Residence


Are you comfortable in your current residence?
Yes ____ No ____

Would you like to remain in your current residence for as long as possible?
Yes ____ No ____ Not Sure ____


What makes you want to remain in your current home?
(Check all that apply)

- ☐ Location
- ☐ Cost
- ☐ Size (e.g., # bedrooms, square footage)
- ☐ Accommodations for your physical condition(s)
- ☐ Universal design features
- ☐ Energy sources and related costs
- ☐ Proximity to stores and services
- ☐ Proximity to recreational facilities
- ☐ Access to local transportation
- ☐ Proximity to medical care
- ☐ Proximity to family
- ☐ Proximity to friends
- ☐ Familiarity
- ☐ Local weather
- ☐ Other: *Please explain*

**AGE
— IN —
PLACE?**



OR



**MAKE
— A —
MOVE?**

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CONNECTION & GROWTH

General cont...

Do you have enough opportunities to do things that interest and/or challenge you?
Yes ____ No ____ Not Sure ____

If you answered “no”:
What interests would you like to pursue? (Select all that apply)

<input type="checkbox"/> Gardening	<input type="checkbox"/> Carpentry/Woodworking
<input type="checkbox"/> Games (solo or with friends)	<input type="checkbox"/> Hunting/Fishing
<input type="checkbox"/> Reading or writing	<input type="checkbox"/> Camping/Hiking
<input type="checkbox"/> Visual Art or Crafts	<input type="checkbox"/> Outdoor Hobbies, i.e. birding
<input type="checkbox"/> Music or other Performing Arts	<input type="checkbox"/> Genealogy/History
<input type="checkbox"/> Charitable or Civic Work	<input type="checkbox"/> Solo exercise (i.e. cycling, swimming)
<input type="checkbox"/> Competitive Activities	<input type="checkbox"/> Group exercise, classes, or sports
<input type="checkbox"/> Touring/Travel	<input type="checkbox"/> Car Repair/Restoration
<input type="checkbox"/> Classes (Lifelong Learning Institute)	<input type="checkbox"/> Other: _____

Do you enjoy traveling either internationally or domestically? Yes ____ No ____

Are you able to travel as much as you would like?
Yes ____ No ____ Not Sure ____

If you answered “no” or “not sure”:
What is preventing you?

- ☐ Physical limitations/health challenges
- ☐ Finances
- ☐ Lack of a travel partner
- ☐ Lack information on travel options
- ☐ Other: _____



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Some of chapters (Housing, Health & Wellness) have more questions than others (Transportation, Personal Finance, Connection & Growth). As you plan your workshop, set aside more time for participants to work on these longer chapters. Depending on how your group wants to work together, you may want to make a plan to come back together to continue the **DISCUSSION** for some of the topic areas.

Reassure your participants that they are not expected to get through all the questions in one sitting. Some of the information they need will be at home, will require additional research, or may just take participants more time to think through.

STRUCTURE OF WORKBOOK: TOPIC CHAPTERS

HEALTH & WELLNESS

Private Healthcare Plans

(NOTE: If you are eligible for Medicare, please skip this section)

If you are not eligible for Medicare, do you have a private health care plan?

Yes No

If you answered “no”:

a. Can you afford a private plan?

Yes ___ No ___ Not Sure ___

b. Have you used healthcare.gov to compare available plans? (link at right)

Yes ____ No ____

If you answered “yes”:

a. Are your benefits sufficient to cover your medical costs?

Yes No Not Sure

If you have a high-deductible health plan, do you utilize the benefits of a Health Savings Account?

Yes No

If you are employed, does your employer offer Flexible Spending Accounts?
Yes _____ No _____

Did You Know?

Older adults between the ages of 50 and 64 often experience rising out-of-pocket healthcare expenses and declining access. A recent AARP Public Policy Institute study found that one in three adults in this pre-Medicare edibility group is spending at least 10 percent of their after-tax income on healthcare.

If you retire before 65 without health coverage, or are still working but not eligible for health insurance through your employer, you may want to explore your options via the Healthcare.gov Health Insurance Marketplace. There you can find out if you qualify for a private plan with premium tax credits and lower out-of-pocket costs depending on your income and household size.

<https://www.healthcare.gov/retirees/>

Did You Know?

Flexible Spending Accounts (FSAs) and Health Savings Accounts (HSAs) are special tax-advantaged accounts that allow people to save money to pay for qualified medical expenses. Although they are similar, they have some key differences. Figuring out if one of these options is a good fit for your circumstances might seem complicated, but it boils down to a couple key factors:

- Which are you eligible for? Are you eligible for both?
- How predictable are your annual healthcare expenses?
- What is the carryover potential? What happens to any unspent balance?
 - Which account type is a better fit for your tax circumstances?

<https://money.usnews.com/money/personal-finance/articles/2015/11/19/fsa-vs-hsa-how-to-make-the-best-choice-during-open-enrollment>

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HIGHLIGHTED BOXES

In each of the topic chapters, your participants will also find additional information in **DID YOU KNOW** or **HELPFUL RESOURCES** boxes.

In many cases, these supplements relate directly to the questions in the chapter and offers urls (web addresses) to online resources, or contact information for agencies and organizations that can provide direct assistance to older adults.

Encourage your participants to take time after the workshop to explore some of these resources, including those that may exist locally. An electronic version of the workbook is also available on the Aging In Place website; and it includes active hyperlinks to these internet resources.

PARTICIPANT NOTES; PLAN A/PLAN B

Each chapter in the workbook is designed to get participants thinking about how their needs might change in the future.

Advise your participants that it may be helpful to use the **NOTES PAGE** to identify questions they've answered with a "No" or "I don't know". These may highlight issues that the participant should consider exploring further.

Encourage them to make some quick notes before moving on to the next section: Are there items they want to follow up on? New priorities? Outstanding questions? You can also invite them use the last page in the chapter to articulate their “**PLAN A AND PLAN B**” for each topic area. This can be especially helpful for getting people into a “what if” mindset.

PERSONAL FINANCE

Take a look at your responses in this section and note any NO and NOT SURE answers. Use the space below to identify changes you are considering or topics you want to investigate further.

My Personal Finance Questions, Considerations & Priorities:

PERSONAL FINANCE

MY PLAN FOR PERSONAL FINANCE

My "Plan A" for personal finance, i.e. my ideal aging in place scenario is:

My "Plan B" for personal finance if my financial, physical, or health circumstances change:

Actions I will take to make my "Plan A" probable and my "Plan B" possible:

Keep Doing

Start Doing

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STRUCTURE OF WORKBOOK: ADDITIONAL RESOURCES

PERSONAL PLAN DEVELOPMENT

In addition to the topic chapters, the last section of the participant workbook contains a number of **ADDITIONAL RESOURCES**.

We've created an open-ended space where participants can create **PERSONALIZED CHECKLISTS** that can help them put their plan into action. We've broken these into five categories:

- Records or documents to create/compile
- Legal documents to update/create
- Outside expertise or professional services
- Discussions to have with family and others
- Other items to tackle

Three overlapping pages of a workbook titled 'PERSONAL PLAN DEVELOPMENT CHECKLISTS'. The top page is titled 'UNDERSTANDING YOUR PRIORITIES: DEVELOPING YOUR PLAN' and contains introductory text. The middle page is titled 'LEGAL ACTIONS OR DOCUMENTS I WANT TO PURSUE/CREATE:' and has a list of checkboxes. The bottom page is titled 'IMPORTANT DOCUMENTS/INFORMATION LIST:' and 'HOW TO ACCESS/CONTACT THEM:' and contains a detailed list of items to check, including 'Will or Trust', 'Power of Attorney', 'Bank & Investment Accounts', 'List of Property/Assets', 'Safe, Safe Deposit Box or Storage', 'Insurance Documents', 'Advance Directive and/or Living Will', 'Healthcare Proxy and/or DNR', 'Organ Donation', 'Vital Health Information', 'Funeral Wishes, Message to Family', 'Funeral Pre-Planning', 'Wishes/Directions for Pets', 'Recurring Bills (Utilities, etc.)', 'Credit Cards', 'Online Accounts (login/passwords)', 'Pension, Social Security', 'Emergency Contacts', 'Financial Professionals', 'Healthcare Professionals', and 'Legal Professionals'. The bottom page also includes the text 'Aging in Place: Your Home, Your Community, Your Choice' and 'Additional Resources | 61'.

BUILDING A PERSONALIZED CHECKLIST

Recall that the last page of each chapter offered space for your participants to think about and articulate their **PLAN A**, their ideal scenario, and their **PLAN B**, their preferred alternative in the event their physical, cognitive, financial, and/or support circumstances change significantly.

Encourage your participants to spend some more time exploring these “what ifs” and deciding what they might need to keep doing or start doing to make their Plan A probable and their Plan B possible.

The **CHECKLISTS** in the resources section of the workbook offer a place to list out, in concrete terms, the things they want to take action on. Listing these out can also serve as an excellent jumping off point for conversations with family and others in the participant’s support network.

STRUCTURE OF WORKBOOK: ADDITIONAL RESOURCES

BUDGET PLANNING

Managing **PERSONAL FINANCES** pre- and post-retirement is a significant challenge for many older adults, particularly because it is difficult to budget for the unknown. Will physical capabilities change requiring your participants to hire in-home helpers or skilled nursing? Will they experience

a significant increase in medical expenses? If they need to stop driving, how much would it cost to regularly use taxis or a ride-hailing service?

Encourage your participants to imagine an array of circumstances and budget for them. Although it isn't pleasant to imagine some of these worst-case scenarios, you should emphasize that it is wise to "hope for the best, plan for the worst, and prepare to be surprised."

HOME MAINTENANCE CHECKLISTS

The very last thing in the workbook is a set of **SEASONAL HOME MAINTENANCE CHECKLISTS**.

Aging experts have identified deferred home maintenance as a real and growing challenge for older adults, one that can impact the durability (and value) of their home, can lead to expensive repair bills, and can even threaten their health and safety. Not only will regular home maintenance help your participants avoid costly repairs, but following the checklists could help them identify hidden health and safety problems that could diminish their ability to successfully age in place.

Many older adults report that it can be challenging to find contractors and/or trades people that they feel they can trust.

When you highlight this last portion of the workbook, you can also ask if any of your participants have recommendations for local tradespersons they want to share.

TIPS FOR HOSTING A WORKSHOP

PLANNING YOUR WORKSHOP: GETTING STARTED

The basics: virtual or in-person, date, time, venue, directions, publicity, participants

First off, you will want to decide if you want to host an in-person or virtual workshop. There are pros and cons to both approaches (see tips for hosting a virtual workshop on page 28). It's also up to you if you want to offer a more structured workshop like a series of regularly scheduled classes offered at your local community center. Alternatively, you might prefer to offer something more informal such as a regular potluck between friends followed by discussion centered around a workbook section. How you do it is totally up to you!

Whether you are doing an in-person or virtual workshop, select a **DATE** and **TIME** that you think will be convenient for your target audience. Depending on the needs of your group, you may want to do a short workshop (single half-day event), a slightly longer workshop (two half-day sessions), or an open-ended process that meets regularly over a longer time frame. To help, we have provided some sample agenda options for you (see the Resources, Forms & Templates Section).

If you are doing an in-person workshop, remember to book your **VENUE** before inviting people. There are many great choices that you can usually use for free: a room at a community center, a local library, a place of worship or a private home. Again, you can make it as formal or informal as you would like, but be sure to pick a space that:

- Has enough table space and chairs to accommodate your participants comfortably
- Is in an easy-to-find location with a room that is accessible for mobility impairments
- Has other elements you will need: sufficient lighting, outlets, accessible bathrooms, etc.

It is a good idea to include the venue name in the workshop invitation or publicity materials. Once people have registered, you can supply them with more detailed **DIRECTIONS**. On the day of your event, you may also want to post signs directing people to the space.

PUBLICIZE your workshop. Are you sending invitations to a specific group or opening the workshop up to the public? You can reach people through email listservs (such as for a neighborhood or community group) or online through social media. You can also use the sample flyer we have provided in the resources section to advertise the workshop, either as a physical flyer or as an attachment to an email. An editable version of this flyer can also be found on the website: www.nrva.org (see the Resources, Forms & Templates Section).

Always give at least four weeks of lead time when putting out the invitation to **PARTICIPANTS**. You want people to have a chance to check their calendars and make the commitment to attend. You will want to limit the workshop to 25 people or fewer, so we recommend that you ask people to register. It's also usually helpful to send out a **REMINDER** to participants a day or two ahead of your event.

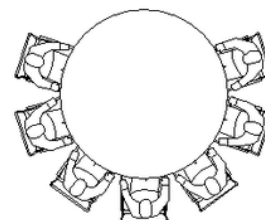
TIPS FOR HOSTING A WORKSHOP

PLANNING YOUR WORKSHOP: GETTING STARTED

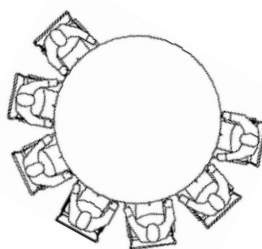
The basics: resource selection, technology, room setup, accessibility

When figuring out your room setup, first decide on the **RESOURCES** you plan to use. If you will be showing videos and/or PowerPoint slides, you will need to set the room up to incorporate **TECHNOLOGY**. If the venue does not have a computer, projector and/or screen that you can use, you will need to bring your own. If working with a small group in your home, it may be more practical to show the presentation or videos on a computer screen. Another factor in room setup is the location of electrical outlets. Will you need an extension cord? Can the room be darkened so that people can see the screen? Do you need to bring external speakers so participants can properly hear the videos? And make sure you get the Wi-Fi password ahead of time so you are able to stream the videos if you plan to use them.

Remember, using technology (PowerPoint presentation, videos) is completely optional, but if you do plan to use them, make sure your room setup will ensure everything will work and your participants can see and hear them well.

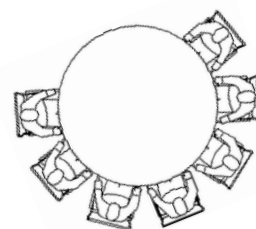


ROOM SETUP. People will need a place to sit with a generous writing surface. A room with movable tables and chairs is ideal. To facilitate small group discussion, we suggest putting people in groups of four, six or no more than eight. You may need to be flexible on the day of your event and move people around so there are a similar number of people at each table. You will definitely want to see the room ahead of time so you can determine how you want to set up tables and chairs and any other equipment you plan to use.



Tables that seat 6 to 8 participants will help foster small group discussions.

If you plan to use video or PowerPoint slides, make sure none of your participants' back are to the screen.



Another key factor in selecting a venue and determining your room setup is **ACCESSIBILITY**. Some of your participants may have mobility impairments, hearing loss or low vision. Will the building and the room work well for people with these impairments? You may want to consider using a microphone if you are working with a large group, or the acoustics of the space could make it difficult for those who are hearing-impaired. Lastly, although the workbook is printed with slightly larger type, you may also want to bring a hand-held magnifier to assist any participants with low vision. It's also a good idea to assess ahead of time if you can adjust the temperature to ensure the comfort of your participants.



TIPS FOR HOSTING A WORKSHOP

PLANNING YOUR WORKSHOP: SET THE AGENDA

The basics: agenda, topics, questions, introductions, icebreakers

We have provided several template **AGENDAS** in the resources section of this facilitation guide; editable versions of these can be found on the website. Select the agenda type that you think will work best for your group (see the Resources, Forms & Templates Section starting on page 19).

We do suggest you discuss the **TOPICS** in the order they are presented in the workbook. If there is a particular topic that you think will warrant more discussion within your group, feel free too adjust the timing of your agenda, or split it over two or more sessions to give your participants time for a deeper dive. In our observation, the housing chapter takes the longest, while the transportation chapter tends to go pretty quickly. Because the topics are about how we live our everyday lives, you will find there is overlap between them. That's okay – it's a good exercise to have participants explore these topics from different perspectives!



Let your participants know that they probably will not be able to answer all of the **QUESTIONS** in one sitting. There will be some that they may not know the answers to or might need documents at home to answer properly. Some questions may prompt further contemplation or discussions with family. The goal of the workshop is to cover the topics and to get people thinking, talking and planning. It is the beginning of planning for aging in place - an important first step, but only the first step.

At the start of your workshop, be sure to set aside time for **INTRODUCTIONS**. Introduce yourself including why you stepped up to offer this workshop. You'll also want to briefly cover the logistics of your time together: review the agenda and fill in practical information like the location of the restrooms. Allow some time to let your participants introduce themselves and share why they are attending. You may also want to consider some type of **ICEBREAKER** activity. You could ask them to share one thing that they like most about where they live now, and one thing they would change about it. Really, any simple and quick-to-answer question will do. Be sure to model a brief response so participants don't get into extended story-telling: *"I'll start. The thing I like best about my home is the screen porch in summer. The one thing I would change is it is too expensive to heat in the winter."* The point is to enable participants to get to know one another just a bit. This will make people more comfortable and more likely to talk with one another when discussion time rolls around. If you decide you want to establish agreements (see next page), you will want to do this now, before you direct the group to start their first section in the workbook.

TIPS FOR HOSTING A WORKSHOP

PLANNING YOUR WORKSHOP: PROCESS & GROUP DYNAMICS

The basics: schedule, breaks, time-keeping, group dynamics, agreements, discussion questions

As you think about how to **SCHEDULE** your session(s), don't forget to include a short **BREAK** during the workshop. This will give people a chance to stretch, use the restroom, or chat informally. Make sure participants know when you will reconvene before you start the break.

People will expect the workshop to finish on time, so you will want to decide how you will **KEEP TRACK OF TIME** and get back on schedule if you fall behind. That said, it can be challenging to be present and engaged as a facilitator while also needing to check your watch or phone. A timer that everyone can see tends to keep people focused on the task and on time.



A wall clock or even a simple kitchen timer works well, but if you plan to offer workshops regularly, you may want to invest in a **MEETING TIMER**. A meeting timer operates exactly like a kitchen timer, only it is big enough for everyone to see how much time is left. We recommend that you set the meeting timer (or point to the wall clock) and be sure that your participants know how much time you will be spending on the next section, whether it is 10 minutes or an hour.



If you don't have either of these time-keeping options at your disposal, you may want to ask a participant to be your **TIMEKEEPER**. If you do recruit a timekeeper, ask them to give you (and the group) a two-minute warning when time is nearly up for the particular section you are working on.



You may encounter some challenges with **GROUP DYNAMICS**. You want people to talk, share ideas and information, but you should be aware of some common circumstances when you're working with groups. Some people may dominate the conversation or frequently interrupt other speakers, others may have difficulty staying focused on the topic or task at hand, while still others may be reluctant to speak up without a bit of encouragement. Many facilitators find it useful to suggest a set of **AGREEMENTS** to ensure people are respectful of each other and the process. Some additional guidance on successfully managing group dynamics is offered on page 23. There you will also find a draft set of agreements that you are free to use or amend if you think that would be helpful with your particular group (see the Resources, Forms & Templates Section).

One last thought on group dynamics. If you see that some groups are having a robust discussion and others are not, stop by the struggling group and help get the conversation going by asking a question or sharing an idea from one of the other groups. We've also provided a list of topic area **DISCUSSION QUESTIONS** on page 23. It's a good idea to have these in your back pocket just in case (see the Resources, Forms & Templates Section).

TIPS FOR HOSTING A WORKSHOP

PLANNING YOUR WORKSHOP: PREPARATION & SUPPLIES

The basics: arrival, directional signage, supplies, refreshments, printing, technology

ARRIVE early to the facility on the day of your workshop. This will allow you to double-check that you have everything you need and deal with anything unexpected. It is a good idea to have a phone number of someone who can help you if you need assistance with the space (e.g. locked doors, technology hiccups). If this is the first time some of your participants have been to this venue, you will probably want to make some **SIGNS** directing folks to the building and/or room. Make sure you have chosen a route in and out of the workshop space that will be accessible to users with a mobility impairment.

Depending on how you are structuring your workshop, you'll want to make a list of appropriate **SUPPLIES**. One good thing to have is adhesive nametags. Unless the participants already know each other, nametags will go a long way toward fostering conversation. Most participants will bring their own pen or pencil, but it will be helpful to have some extras. If you decide to provide simple **REFRESHMENTS**, make sure you also have cups, napkins or small plates.

You'll want to **PRINT** an agenda for each table so they understand how the workshop will unfold and how long each section will last. Having a physical agenda is also useful for keeping people on track if they know how much time the group will be spending on each section. Most importantly, you will need to have enough **WORKBOOKS** — one for each participant. The workbook itself is fairly long, 60 pages (30 double-sided), and should be spiral bound or placed in a three-ringer binder. These can be ordered through the New River Valley Agency on Aging. To request a set of workbooks, email tinaking@nrva.org or call 540-980-7720 well in advance of your scheduled workshop. Please note, the Agency on Aging will need to charge a per-workbook **FEE** to cover their printing/binding costs. It is perfectly okay to ask your participants to bring money on the day of the workshop to cover this. Alternatively, you can ask your participants to download and pre-print their own copy of the workbook to bring to the workshop. A folder with side pockets can also be useful, to include scratch paper, any local resources you want to share, and the post-workshop evaluation form.

There are some specific **TECHNOLOGY** supplies you might also need. If you are using a projector to display the PowerPoint presentation, you may also want to bring a “clicker,” a device to advance your presentation slides. Using a **CLICKER** will free you from being tethered to the computer and will make your presentation feel more conversational. If you are bringing your own equipment (computer, projector), make sure you have all the appropriate **CORDS** and be sure to test your equipment ahead of time in the space. In our experience, it's useful to have both an HDMI and VGA cord on hand, if you're using someone else's equipment. A long, multi-prong extension cord can also come in handy if the outlets are not conveniently located in the room. If you don't have a white wall to project onto, you may want to bring a projector **SCREEN** or even a white sheet that can be temporarily affixed to a wall with painter's tape.



VGA and HDMI cords

TIPS FOR HOSTING A WORKSHOP

PLANNING YOUR WORKSHOP: POST WORKSHOP FOLLOW UP & EVALUATION

The basics: facilitator ≠ expert, feedback, evaluation form, next steps, strategies, action

While it will be valuable for you to familiarize yourself ahead of time with the workbook, this Facilitation Guide, and the other resources we have provided, you absolutely do not need to be an **EXPERT** on aging or any of the five topic areas in order to host a successful workshop. Your role is simply to create a supportive setting for participants to explore these topics, facilitate a conversation and keep it moving. You do not need to have all the answers and remember, “I don’t know” is a perfectly acceptable response. If you have a participant with a question or circumstance that goes beyond what is addressed in the workbook or presentation materials, your role will be to simply point them to resources that can help them find the additional information they may need. In many cases, this will be a local Area Agency on Aging.

If you plan to offer multiple workshops, it will be helpful to solicit constructive **FEEDBACK** from your participants on what worked well and what they might change or adjust. We have provided a template workshop **EVALUATION FORM** in the resources section of the facilitation guide; there is also an editable version available for download on the website.

Let’s fast-forward in time. Your workshop has been a great success, congratulations! Now let’s think about what comes after. Your participants have been learning and talking and sharing; they are energized. So, how do you keep the **MOMENTUM** going?

At the end of the workshop, be sure to talk with your participants about **NEXT STEPS**. Are they interested in setting up an accountability partnership with other participants to check in with occasionally? Do they want you to reach out in a month or so and see how they are doing? (Note: only offer this if this is something you would be willing to

do). Does the group want to get back together again at some future date and share progress stories? Be sure to allow time to talk with your participants at the close of the workshop and help them identify next steps: **STRATEGIES** to continue the planning work, and to translate their plan into **ACTION**. Ultimately, you want to make sure the workshop is the beginning of a longer process of inquiry, reflection, and action, not a one-off event.



FACILITATION RESOURCES, FORMS & TEMPLATES

SAMPLE WORKSHOP FLYER*

***Aging in Place: Your Home, Your Community, Your Choice
Free Planning Workshop***

"I've lived here for 40 years. No other place will seem like home."

"The stairs are getting more difficult to climb."

"I'm having a hard time keeping up with yard and home maintenance."

"Will my savings run out?"



Planning ahead for aging in place can be hard since no one truly knows how their needs might change in their later years. It's also easy to put off for another day, but the sooner you can get proactive about planning for aging in place, the more likely you will be to remain independent and in the home of your choosing. If this interests you, please plan to attend this free workshop on:

Month/Day/Year
Location/Address
start time to end time

The materials for the workshop were developed by the New River Valley, Virginia Aging In Place Leadership Team and will cover five topics: Housing, Health & Wellness, Transportation, Personal Finance, and Connection & Growth.

**For more information or to register, contact
Name of Workshop Host at
phone number or email.**

There is no charge for the workshop or workshop materials, but please register by DATE.
-or-
There is a \$\$\$ fee to cover the cost of workshop materials; please register by DATE.



* an editable version of this workshop flyer can be downloaded from the website: www.nrvaoa.org

FACILITATION RESOURCES, FORMS & TEMPLATES

WORKSHOP CHECKLIST*

PRE-PLANNING:

- ☐ Determine if you want to do an in-person or virtual workshop (virtual workshop tips on pg. 28)
- ☐ Select preferred agenda type (templates provided; editable versions on website)
- ☐ Set event date/time; reserve venue, contact person/phone # for event space
- ☐ Determine if you need to charge a fee to cover the costs of the workshop (e.g. workbooks)
- ☐ Determine minimum and maximum # of participants
- ☐ Send invitations or publicize event (email, social media, physical flyers, etc.)
- ☐ Determine if and how you will use technology (presentation slides, videos)
- ☐ Determine room setup if in-person, or video conferencing platform if virtual
- ☐ Send out reminder to registered participants (include address/directions or Zoom link if virtual)

PRINTING:

- ☐ Agenda for each participant (or at least one per table)
- ☐ Workbook for each participant (bound or placed in small three-ring binder)
- ☐ Local Resources Sheet and/or Workshop Evaluation Form (both optional)

TECHNOLOGY:

- ☐ Download template presentation (template provided; editable version on website)
- ☐ Computer (pre-load and open presentation and video links—test before participants arrive)
- ☐ Projector (clicker optional)
- ☐ Microphone and/or speakers if needed
- ☐ Connector cords for computer & projector (make sure you know what kind you will need)
- ☐ Multi-prong extension cord or surge protector

MISCELLANEOUS SUPPLIES:

- ☐ Directional signage (optional); Refreshments + cups, napkins, etc. (optional)
- ☐ Adhesive nametags + sharpie/marker; extra pens and pencils; scrap paper or note cards
- ☐ Timekeeping device (feel free to ask a participant to help with timekeeping)
- ☐ Other: _____

* an editable version of this checklist can be downloaded from the website: www.nrvaooa.org

FACILITATION RESOURCES, FORMS & TEMPLATES

SELECTING AND FINE-TUNING YOUR AGENDA:

The basics: agenda options, general recommendations, start times, breaks, process

On the pages that follow, you will find three **AGENDA OPTIONS** for running a workshop, which you are free to use or amend to better meet the needs of your participants. Editable versions of each one can be found on the New River Valley Area Agency on Aging website: www.nrvaoa.org

The **FIRST AGENDA OPTION** is the shortest, and can be accomplished in a single, 3-hour session. This option will offer your participants a quick tour through the five topic chapters which they can continue to explore on their own after the workshop. This agenda option might be well-suited to a group that prefers a shorter time commitment. That said, past participants have reported they would like to have had more time for discussion than this option allows.

The **SECOND AGENDA OPTION** allows more time both for answering questions in the workbook and for group discussion - breaking the workshop up over two half-day sessions.

The **THIRD AGENDA OPTION** is the most informal and simply offers an open-ended process for a group to explore the workbook topic-by-topic over several weeks or months while still providing some structure.

Regardless of which agenda option you choose, we do have some **GENERAL RECOMMENDATIONS**:

1. If you select one of the more structured agenda options (#1 or #2) it will be useful for you to calculate out the **START TIMES** for each section, so you can see if you are running behind or ahead of schedule. In the sample agendas we have provided, the workshop is shown as starting at 1 pm and concluding at 4 pm.; please amend to fit the start time for your workshop.
2. Although you should tell your participants they can take a break at any time during the workshop to use the restroom or stretch their legs, it is also a good idea to schedule an official **BREAK** for the whole group at about the midway point for each day.
3. We recommend you use the following **PROCESS** as you move through each of the chapters:
 - First, take about 5 minutes to cover the **KEY POINTS** before beginning each section. We have provided options to make that easier for you; use whichever you think is the best fit.
 - Then, allow participants an appropriate amount of time to read and answer **CHAPTER QUESTIONS**. (suggested times are shown for each agenda option)
 - Lastly, conclude each chapter with at least 10 minutes of small **GROUP DISCUSSION**. We have found that more time for discussion is generally better.
4. If you select the less structured agenda option (#3), you will find additional recommendations for a more open-ended process on page 22.

FACILITATION RESOURCES, FORMS & TEMPLATES

SAMPLE AGENDA OPTION #1: SHORT WORKSHOP (3 HOURS)*

Aging in Place Workshop Sample Agenda Option #1 – Single Session (Total time: 180 min)		
	Activity Time	Start Time
Welcome & Intro	10 min	1:00
Table Introductions	5 min	1:10
	15 min	
Workbook (1st half)		
Section 1: Housing ¹	35 min	1:15
Key Points (~5 min)		
Individual Workbook Time (20 min)		
Small Group Discussion (~10 min)		
Section 2: Health & Wellness	35 min	1:50
	70 min	
BREAK	5 min	2:25 (start)
Workbook (2nd half)		
Section 3: Personal Finance	30 min	2:30
Key Points (~5 min)		
Individual Workbook Time (15 min)		
Small Group Discussion (~10 min)		
Section 4: Transportation	20 min	3:00
Section 5: Connection & Growth	20 min	3:20
	70 min	
Closing Thoughts; Next Steps Beyond the Workshop	15 min	3:40
Evaluation	5 min	3:55
	20 min	

¹ We recommend that you cover each topic section in the same way: First, you should take about 5 minutes to cover the key points with the whole group. Next, you will want to give your participants a certain amount of time to read and answer the workbook questions for that section. Last, leave about 10 minutes at the end for either small group or whole group discussion. In the sample agenda above, a suggested breakdown is shown for the Housing and Personal Finance sections. The recommended TOTAL times are different for each section, so you will need to adjust accordingly.

* an editable version of this sample agenda can be downloaded from the website, www.nrvaooa.org

FACILITATION RESOURCES, FORMS & TEMPLATES

SAMPLE AGENDA #2: TWO HALF-DAY SESSIONS (6 HOURS)*

Aging in Place Workshop Sample Agenda Option #2 – Two Half-Day Sessions (Total Time ~ 6 hours)		
	Activity Time	Start Time
<u>DAY ONE</u>		
Welcome & Intro	10 min	1:00
Table Introductions	5 min	1:10
Workbook (1st half):		
Section 1: Housing	65 min	1:15
Key Points (~5 min)		
Individual Workbook Time (35 min)		
Small Group Discussion (~20 min)		
Section 2: Health & Wellness	65 min	2:20
BREAK	5 min	3:30 (start)
Group Discussion:		
Questions; Day One Key Takeaways & Insights	20 min	3:35
Closing Thoughts; Next Steps for Day Two	5 min	3:55
<u>DAY ONE END</u>		4:00
<u>DAY TWO</u>		
Workbook (2nd half):		
Section 3: Personal Finance	50 min	1:00
BREAK	5 min	1:50 (start)
Section 4: Transportation	40 min	1:55
Section 5: Connection & Growth	40 min	2:35
Group Discussion:		
Questions; Day Two Key Takeaways & Insights	20 min	3:15
Closing Thoughts; Next Steps Beyond the Workshop	15 min	3:35
Workshop Evaluation	10 min	3:50
<u>DAY TWO END</u>		4:00

¹ We recommend that you cover each topic section in the same way: First, you should take about 5 minutes to cover the key points with the whole group. Next, you will want to give your participants a certain amount of time to read and answer the workbook questions for that section. Last, leave about 20 minutes at the end for either small group or whole group discussion. In the sample agenda above, a suggested breakdown is shown for just the Housing section. The recommended TOTAL times are different for each section, so you will need to adjust accordingly.

* an editable version of this sample agenda can be downloaded from the website: www.nrvaooa.org

FACILITATION RESOURCES, FORMS & TEMPLATES

SAMPLE AGENDA #3: CHAPTER BY CHAPTER SESSIONS (NO TIME FRAME)

The needs of your group may be better suited to a longer-term process where there is more time for discussion and your participants can take their time working through each chapter. This format may work best for an established group that knows each other well. If you decide to do a chapter-by-chapter approach, we do have a few recommendations:

- Decide how much **TIME** you want to spend for each session. An hour is probably the minimum (90 minutes might be more realistic), especially for certain chapters like Housing and Health & Wellness which usually take longer. Also decide on the **FREQUENCY** that will work best. Does your group want to meet weekly? Monthly? Lastly, we recommend setting a **CONSISTENT** day/time/location.
- We recommend that you do the chapters in the **ORDER** they are presented. At a minimum, you will want to start off with the Housing Chapter since many of the considerations surrounding housing will have critical intersections and impacts on the other topic areas.
- Spend about five minutes reviewing the **KEY POINTS** when you begin a new topic chapter. We have provided options to make that easier for you; use whichever you think is the best fit.
 - narrative of the key points provided on the first page of each chapter of the workbook
 - a video series on the website covering each topic area
 - a template PowerPoint presentation covering the key points for each topic area
- Allow a certain amount of time for participants to work through the **QUESTIONS** in each chapter. Stress to your participants that it is okay if they don't know the answer to all of them. For many questions, the answer will be "it depends". In fact, answers that reveal uncertainty are a great jumping off point for discussion.
- It's up to you to decide how to divide the time between individual workbook time and group **DISCUSSION**. Through discussion, participants can often help each other by sharing personal experiences and exploring options.
- Work through the chapters at a **PACE** that works for your group. You may find that they want to spend several sessions on a more challenging topic. With an open-ended process, you will have the flexibility to adjust the pace as needed to respond to the group's needs.
- After your group has completed the workbook, be sure to ask them how they want to **CONTINUE** the work and put their plan into action. Some options to offer: a) setting a time to get back together to discuss progress and/or challenges, b) encouraging them to find an accountability partner within the group. The key is to encourage them to keep planning and translating their plans into action.

FACILITATION RESOURCES, FORMS & TEMPLATES

AGREEMENTS

Your workshop will be more successful and engaging if your participants are talking and sharing ideas and information with one another. That said, you should also be aware that challenging group dynamics can sometimes occur. You may have a strong personality who dominates the conversation. As the facilitator, you can limit their impact by proactively asking other people for input. Quiet or shy individuals need to know their input is valued and will appreciate being asked for their thoughts on a topic. Occasionally there will be someone who has difficulty staying focused and you may need to kindly intercede to get the discussion back on track.

Many facilitators find it useful to suggest a set of agreements to ensure people are respectful of each other and the process. Framing them as “agreements” rather than “rules”, and asking if the group wants to add to or amend the ones you have suggested can be very useful for minimizing challenging dynamics. If you plan to use them, it is usually best to offer them up at outset of the workshop.

We have provided this set of **SUGGESTED GROUP AGREEMENTS**, which are also included in the template PowerPoint slide deck. These may be especially useful if you are using one of the more structured agendas, or if the participants in your group don’t already know each other.

Suggested Group Agreements:

1. *Be willing to support the overall purpose, goals and process of the workshop.*
2. *Ask for clarification when confusion arises.*
3. *Keep the discussion focused; stay on-topic and on-time.*
4. *Listen actively; set phones/distractions aside.*
5. *Make space: if you tend to be pretty vocal in a group discussion, try holding back a bit.*
6. *Take space: if you rarely speak up in a group discussion, push yourself to join in a bit more.*
7. *People may share personal stories in this setting; these should not be shared with others.*



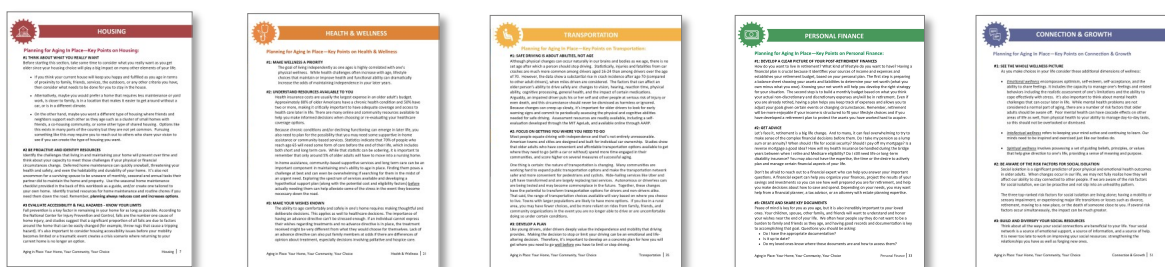
FACILITATION RESOURCES, FORMS & TEMPLATES

COVERING THE KEY POINTS

It is important to introduce each chapter to your participants by first covering the key points. These are designed to frame some of the bigger picture issues related to this topic, and hopefully get them thinking about some of the “what ifs”. To make it easier for you as the facilitator, we have provided you with three options for covering the key points. Decide which of these you think will work best for your group:

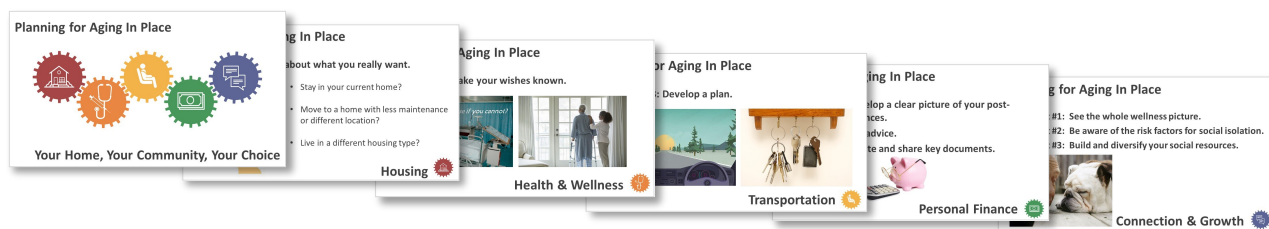
OPTION #1: Participants Read Key Points in Workbook

This is the most straightforward and lowest-tech option. Give your participants about 5 minutes to read the key points for each chapter before they dive into it.



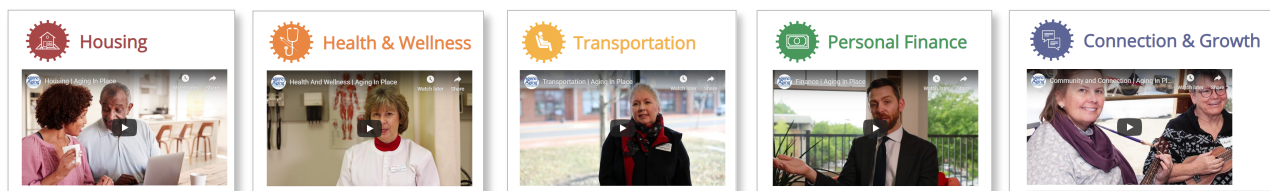
OPTION #2: Template PowerPoint Presentation

We have provided you with a slide deck that covers the key points. The content is the same as in the participant workbook, but your participants may appreciate hearing them as a group.



OPTION #3: Topic-Area Videos

We have also created a set of videos that align with each of the topic areas in the workbook. While the content is not exactly the same as in the workbook or the slide deck, similar themes are covered by each of the video presenters. Note: the length of time varies for each video.



* all videos links and a editable version of the slide deck can be found on the website: www.nrvaooa.org

FACILITATION RESOURCES, FORMS & TEMPLATES

SAMPLE DISCUSSION QUESTIONS

Past participants in the aging-in-place workshops reported that they enjoyed the opportunity to have table (or whole group) discussions with their fellow participants. We recommend setting aside at least 10 minutes for questions and discussion after participants have had time to work through the questions in each chapter. Participants are usually eager to share their own experiences or perspectives and this is a great opportunity for people to learn from one another. In case you have a more reticent group, you can often get the conversation going by throwing out a question or two, so it's a good idea to go into the workshop armed with a few questions for each topic. Feel free to amend these questions or create your own to best meet the needs of your group.

HOUSING

- When you think about where (and how) you want live in your later years, what is most important to you?
- Are you concerned that you might have to make tradeoffs with regard to your housing situation? If so, what concerns you most?
- Do you think there are aspects of your housing situation that might leave you vulnerable? What are they and what do you think you can do to address them?

HEALTH & WELLNESS

- Have you shared your wishes, advanced health directives, or other critical health information with family, friends, or personal advocates?
- Is there anything preventing you from doing so?

TRANSPORTATION

- If you stopped driving tomorrow, how would you get around? Would that solution work for you long-term?
- Are there good alternative transportation options near to where you live?

PERSONAL FINANCE

- Where do you get advice or knowledge to make your financial decisions?
- Have you found any particular individuals or resources helpful to you?

CONNECTION & GROWTH

- Do you feel as socially active as you would like to be?
- If not, what is keeping you from being more socially active? If yes, what social outlets do you enjoy the most?
- Can you recommend any local opportunities to socialize, be active, or get involved in the community?

FACILITATION RESOURCES, FORMS & TEMPLATES

IN-WORKBOOK RESOURCES

Helpful Resources

If you are uncertain if you or a family member should continue driving, the following resource may be of help:

https://s0.hfdstatic.com/sites/the_hartford/files/your-road-ahead-2012.pdf

Warning Signs to Look For:

- Delayed response to unexpected situations
- Becoming easily distracted while driving
- Decrease in confidence while driving
- Having difficulty moving into or maintaining the correct lane of traffic
- Hitting curbs when making right turns or backing up
- Getting scrapes or dents on car, garage or mailbox
- Having frequent “close calls”
- Driving too fast or too slow for road conditions

Before holding your workshop, we encourage you to familiarize yourself with the **HYPERLINKED RESOURCES** in each of the workbook topic chapters, usually in side boxes with headings like “Helpful Resources” and “Did You Know?”. Participants will often have questions that can be addressed at one of these sites. You can click on the hyperlinks directly in the online version of the workbook, but we have also included the full web address for each of the online resources so you and/or your participants can type them directly into an internet browser. These resources can also be used to customize your workshop or enable your participants to more fully explore one of the topics. This might be particularly useful if you plan to work with a group over multiple sessions, or you know ahead of time that your participants are interested in taking a deeper dive on a particular topic.

For your convenience, we have consolidated the list of the in-workbook resources for quicker reference on the aging in place website: <http://www.nrvaoo.org/aging-in-place/assets/documents/workbook-website-resources.pdf>

ASSEMBLING LOCAL RESOURCES

All of the resources in the workbook are general in nature, i.e. not linked to a particular locality or region. If you wish to do so, you could also research some local resources ahead of time to share with your participants. The following categories are usually most helpful:

- **General:** a public agency or private organization dedicated to supporting older adults; usually an Area Agency on Aging. Most Area Agencies on Aging will be able to help you find and connect with the services, resources and information that exist in your community. The spectrum ranges from finding transportation options, in-home and community based services, housing and home repair possibilities, volunteer opportunities, Medicare and related health insurance, elder rights, public benefits and long term care community based and facility based supports in the community. These can typically be found by searching: www.eldercare.acl.gov
- **Health and Human Services Information:** call 211 or search www.211.org to find a wide array of local services from disaster assistance to healthcare access to help with essential needs.
- **Local AARP Chapter:** A local AARP Chapter can also help connect your participants to a social network, volunteer opportunities, and education & advocacy work. To find if there is a local AARP chapter in your area search www.aarp.org/aarp-chapter-locator

FACILITATION RESOURCES, FORMS & TEMPLATES

SAMPLE WORKSHOP EVALUATION FORM*

Congratulations, you've just wrapped up your aging-in-place workshop! If you plan to host another one, we strongly recommend asking your participants to take a few moments to fill out this short evaluation form. Assure your participants that constructive **FEEDBACK** is welcome and will be used to improve the experience for future participants.

Workshop Evaluation			
Please help us develop future aging in place workshops by circling the best response to each question or writing responses in the spaces provided.			
1. In general, how well did today's workshop meet your expectations?			
Exceeded	Met	Did not meet	
2. How helpful was the small group format in furthering your understanding of what it means to age in place?			
Very Helpful	Helpful	Not at all Helpful	
3. Identify one thing you learned today that you are likely to share with others.			
4. In each of the following sections, how useful were the workbook questions in helping you think about aging in place?			
Housing	Very Useful	Useful	Not Very Useful
Health & Wellness	Very Useful	Useful	Not Very Useful
Personal Finance	Very Useful	Useful	Not Very Useful
Transportation	Very Useful	Useful	Not Very Useful
Connection & Growth	Very Useful	Useful	Not Very Useful
5. What suggestions do you have for improving the workbook? (Use back of sheet if needed)			
6. What suggestions do you have for improving future workshops on this topic? (Use back of sheet if needed)			
Tell us about yourself! Age: _____ Gender: Male Female			
What is your current retirement status? (Circle the best descriptor)			
Retired	Semi-retired (Still working some)	Preparing to retire (Still working)	No intention to retire
Did your spouse or partner also attend today's workshop?		Yes	No
If yes, did you complete the workbook exercises together?		Yes	No

We would also be grateful if you would share feedback directly with the New River Valley Aging In Community Leadership Team, so we can continue to improve this Facilitation Guide, the website, the Aging In Place Workbook and/or any of the accompanying resources. To share feedback, please email tinaking@nrvaooa.org or call 540-980-7720

* an editable version of this sample workshop evaluation form can be downloaded from the website

FACILITATION RESOURCES, FORMS & TEMPLATES

ADDENDUM: TIPS FOR HOSTING A VIRTUAL WORKSHOP

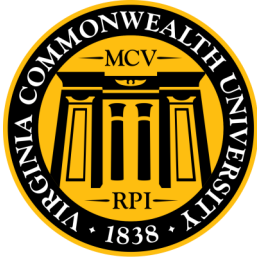
In recent years, there has been tremendous growth in the availability and use of virtual meeting technology. We have learned that some folks prefer this online format. The New River Valley Aging in Place Leadership Team has added this addendum offering tips for hosting a virtual workshop. Below is a list of suggested resources with hyperlinks that will help you create a successful and engaging virtual workshop.

1. **Virtual Meeting/Conferencing Platforms:** There are lots of virtual meeting options that you could potentially use. [Zoom](#) is one of the most common, so we suggest you start there. You can host a Zoom meeting for free, however the free version limits your session length to 40 minutes as well as the number of participants. For that reason, we suggest that you consider securing a paid version (current pricing for the Pro/Small Teams is \$15/month).
2. **Video Meeting/Conferencing Tutorials:** Most of the video conferencing platforms are similar to one another, and relatively intuitive to use. Take some time to become familiar with the features of the platform you are using: how to set up a meeting room, invite participants, open the room, allow participants in, use the chat feature, share your screen, breakout rooms, polling features, etc. Regardless of which platform you choose (Zoom or something else), there are numerous video tutorials online that will walk you step-by-step through almost any feature. Below are some links to get you started:
 - Zoom Help Center: [Zoom video tutorials: the basics](#) (multiple videos)
 - YouTube: [Zoom Tutorial for Beginners](#), 39 min. (Tip: You can mouse over the video progress bar to advance to different topic sections)
3. **Tips and Tricks for Facilitating a Virtual Meeting:** Because hosting a video workshop is little different than hosting one in person, there are a few recommendations we have:
 - While it may be tempting to offer a hybrid workshop with some participating in-person and others joining via Zoom, we have found that this approach adds a lot of complexity and ends up being ineffective for both set of participants.
 - Enlist the help of a few friends or family members to test out the features you plan to use.
 - Tell your participants you will be on the Zoom call 10-15 minutes early to help them troubleshoot any technical issues with audio or video.
 - Ask participants to keep themselves muted unless they are speaking. Small background noises can be very distracting for others and also interrupt the audio feed of the speaker.
 - Try using the [polling feature](#) or the Zoom chat box to kick off the workshop with an icebreaker question. “What’s a talent you always wished you had?” is a good one. You can also use short polling/chat questions to keep your group engaged or prompt a discussion.

FACILITATION GUIDE: ACKNOWLEDGEMENTS

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- Introduction Video: Dr. Nancy Brossoie, Senior Research Scientist, Virginia Tech Center for Gerontology
- Facilitation Video: Anne McClung, Planning & Building Director, Town of Blacksburg, Virginia
- Housing Video: Carol Davis, Sustainability Manager, Town of Blacksburg
- Health and Wellness Video: Dr. Sarah Gilbert, Professor of Nursing at Radford University
- Transportation Video: Chris Blankenship, Mobility Coordinator at the New River Valley, VA Agency on Aging
- Personal Finance: Joel S. Williams and Andrew Miller, Certified Financial Planners with Olio Financial Planning
- Connection and Growth: Dr. Benjamin Katz, Assistant Professor of Human Development, Virginia Tech

FACILITATION GUIDE: ACKNOWLEDGEMENTS

FACILITATION GUIDE ADVISORY TEAM

The New River Valley, Virginia Aging in Community Leadership Team served as project team advisors for this Facilitation Guide as well as the Aging in Place Workbook and Video Series. This cross-sectoral team has been working together since 2011 to create lifespan friendly communities, and is made up of individuals from agencies and organizations across the New River Valley region in Virginia including:

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