# COMMUNITY-LED CHANGE FOR OLDER ADULTS

## A Toolkit for Community Organizing

THE SCAN FOUNDATION

Funded by:

The SCAN Foundation provided financial support for the development of this Toolkit. The SCAN Foundation envisions a society where all of us can age well with purpose. We pursue this vision by igniting bold and equitable changes in how older adults age in both home and community. Our grants and impact investments prioritize communities that have been historically marginalized with an emphasis on older people of color, older adults with lower incomes, and older residents in rural communities.
**www.TheSCANFoundation.org**

Written and developed by:

The Center for Outcomes Research and Education (CORE) is an independent team of scientists, researchers, and data experts with a vision for a healthier, more equitable future. Based in Portland, Oregon, we partner with health systems, foundations, community organizations, and many others to take on today's biggest barriers to better health and deliver insights that help shape and sustain healthier systems, policies, programs, and communities.
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## Acknowledgements

The authors would like to thank The SCAN Foundation for supporting the ECO Groups and the development of this toolkit; the ECO Group Toolkit Advisory Panel, which included staff and members of the ECO Groups; Dr. Patricia Oh, who provided subject matter expertise; Erin Westphal, The SCAN Foundation advisor and program officer on this project; and the many organizations and individuals who developed the community organizing resources referenced throughout this toolkit.



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# Introduction

**In 2024, three California foundations awarded grants to four organizations to launch "Equity Community Organizing Groups" (ECO Groups) in historically marginalized communities.** The SCAN Foundation, California Health Care Foundation, and Metta Fund sought to bring together older adults to identify health inequities facing their communities and come up with potential solutions using community organizing methods. A foundational ECO Group principle was to center the voices and lived experiences of older adults from diverse backgrounds, who are often left out of public health and community planning discussions and decision-making.

### What are ECO Groups?

Equity Community Organizing (ECO) Groups are small, self-directed groups of older adults from historically marginalized communities that work together to reduce health and social inequities by fostering deep community engagement and co-designing solutions.

**As of 2026, the ECO Groups were well-established, overcoming many obstacles along the way.** However, as grant funding winds down, they face challenges familiar to any nonprofit community-based organization—moving from planning to action, demonstrating impact, maintaining member engagement, funding, and long-term sustainability.

### Who is this toolkit for?

This toolkit is designed for community-based organizations interested in starting an ECO Group and those with similar groups who would like to learn from the California groups' examples.

**To learn from the ECO Groups' experiences, The SCAN Foundation partnered with the Providence Center for Research and Education (CORE) to evaluate the groups' activities.** Through interviews and observation, CORE distilled and shared learnings across the groups and with the funders. To spread these learnings beyond the four funded groups, The SCAN Foundation again partnered with CORE to develop this toolkit with resources created during the project and evaluation findings for other community-based organizations and funders interested in pursuing a similar path. In turn, CORE formed an Advisory Panel with members from all four ECO Groups to guide the toolkit's content and design.

**The resulting toolkit includes lessons learned from the groups as well as more general community organizing guidance and links to valuable online resources.**

**This toolkit is structured around a typical journey from early group formation to action and sustainability.** However, keep in mind that every community and group is different—what works in one place may not work in another! Your goals and situation (for example, if you already have an established organization or group) will influence which parts of the toolkit will be most relevant. This resource is not meant to be read cover-to-cover or followed step-by-step. Feel free to jump around and explore!

**We encourage you to take what is helpful from this toolkit, but don't be afraid to make changes and create your own tailored resources.** You know your community the best!

**We wish you the best in your efforts** to engage older adults in identifying and addressing health inequities in your community. Alone, we can only do a little. Together, in community, we can change the world.

*Booker T. Washington ECO Group Meeting*

# Meet the ECO Groups

Meet the four founding ECO Groups, who graciously shared their experiences and learnings to inform the content of this toolkit. Click the "read more" links below to navigate to brief profiles of what each group did and learned.

## Booker T. Washington ECO Group

**Location:** San Francisco, CA

**Focus Area:** Mental health

>> Read more

## Sankofa Elders ECO Group

**Location:** Los Angeles, CA

**Focus Area:** Dignity, care, and well-being of Black elders in LA County

>> Read more

## Cloverdale ECO Group

**Location:** Northern Sonoma County, CA

**Focus Areas:** Housing & language justice

>> Read more

## Imperial Valley ECO Group

**Location:** Imperial County, CA

**Focus Areas:** Varied by community; overall framework of Communities of Care & Belonging

>> Read more

# STEP 1. Understanding Your Purpose

## Guiding Questions

1. What is the overall goal of the ECO Group? What need does it fill that isn't being met by other groups?
2. Who are potential members of the ECO Group?
3. Is a small to medium group of older adults the right fit for your goals?
4. How will you involve potential members in developing your group's purpose?

## Getting Started

Before forming an ECO Group, the first step is developing a general idea of its purpose and design. Start by brainstorming on your own or with a few trusted people. Begin with the "Why?" What need will the group meet? Possibilities include:

- Identifying community health equity issues
- Designing or carrying out actions to address an already identified issue
- Bringing older adults together for relationship-building and mutual support

Your group's purpose may evolve over time as members share their perspectives—that's a good thing! Building flexibility into the group's purpose, meeting agendas, and format will help it grow naturally.

> ***ECO Group Voices***
>
> "The goals were really clear to me. It was a chance to gather these seniors into a space where they have never really been invited."
>
> *-Cloverdale ECO Group Staff*

For new groups, keep in mind it takes time and resources to recruit members, build trust, and reach shared goals. Group leaders should dedicate time and effort to create an environment where members feel comfortable speaking up. This early stage is also a good time to honestly assess the level of time and resources you and/or your organization can commit to developing and maintaining the group.

# Worksheets & External Resources

The following worksheets will help you think through your ideas and decide whether you're ready to start an ECO Group. Click the links below or find them in the appendix.

**>> WORKSHEET 1: ECO Group Purpose Brainstorming**

**>> WORKSHEET 2: Individual/Organization Readiness Self-Assessment**

*Cloverdale ECO Group members meeting*

> ***ECO Group Voices***
>
> "[They were able to] connect with each other and with all of the social service providers and healthcare providers that are local to them and were involved in the project to build a sense of community, to learn to trust each other, and be vulnerable in sharing their experiences and to have fun together, to break bread. To dance, but then also to really start to think about the issues that exist in Cloverdale. And the ways in which the seniors can really learn to uplift their voices and use their voices for change. I believe that those were the goals that were set initially, and I think that they were not only met but really exceeded."
>
> *-Cloverdale ECO Group Staff*

# STEP 2. Setting Up Your Group: Recruitment & Formation

How you recruit older adults for an ECO Group will depend on your community, existing relationships with potential members, and available resources.

## Guiding Questions

1. How many participants are you hoping to recruit?
2. Are there particular groups of people you want to include?
3. What barriers to recruitment and participation do you anticipate?
4. How will you reach older adults in your community?
5. How often will the group meet?
6. What considerations will make participation a positive experience for group members?

## Inviting Community Members

As you decide who to invite, consider whether your group will be organized around shared identity or demographics (such as age, gender, religion, language, neighborhood) or around shared interests. This is also a good time to consider how to make your group welcoming for everyone. For example, if you expect members to speak a mix of languages, plan early how you will handle interpretation and translation so that everyone feels welcome and can participate fully.

## Recruiting Members

The right group size will depend on your goals, how big a group you can reasonably manage, and expectations for participation—is everyone expected to show up at every meeting, or is attendance more casual? Group size will also depend on your budget and space, especially if you plan to offer food (we highly recommend it!) or stipends for group members.

### Who Is the Right Messenger?

Partnering with organizations or individuals who work with older adults and are a trusted presence in the community can significantly increase your recruitment success.

Think about who has relationships with the people you hope to reach—religious institutions, aging resource centers, YMCAs or JCCs, and healthcare and social service providers can all be valuable partners.

### Recruitment Approaches

- **Expanding on an existing group or groups.** It is generally much easier to start a group within an existing organization than from scratch. If your organization or community group already includes older adults, talk with leadership about your idea to get their support. Ask whether you can use existing communication channels—websites, email lists, newsletters, or other methods—to promote the group.
- **Snowball recruitment.** Start by recruiting friends, family, neighbors, or close colleagues, then ask them to invite people they know. This works especially well when trust is central to participation.
- **Advertising in community spaces.** Distribute flyers or promote the group at community events in places where older adults gather.
- **Social media and email lists.** Identify which platforms and email lists potential members use and reach out through those channels.

Clearly communicating your group's vision and what you are asking of members will make it easier for people to commit. Be upfront about meeting frequency, time commitment, and what participation will look like.

### Choosing a Meeting Space

Finding a welcoming, accessible space can be a challenge. When selecting a location, consider:

- Is the space large enough for your group?
- Is it easy to get to, with accessible parking or transportation?
- Is it physically accessible for members with mobility challenges?
- Will it feel welcoming? For example, is signage available in multiple languages? If it is a religious space, will all members feel comfortable there?

## Structuring the Group

### Scheduling

Talk with potential members about their schedules and preferences. For groups that include multiple generations, preferences may differ by age, and you may need to balance competing priorities. Consider:

- When will you meet?
- How often will you meet?
- How long will meetings be?

Meeting length and frequency will vary depending on your group's focus and format. For example, groups focused on creating social spaces and building relationships may meet more often.

### Meeting Structure

Your meeting structure should reflect group goals and member preferences. Some things to consider:

- Is the group's goal primarily social or more action-oriented? Social groups generally don't need agendas or a formal meeting structure; more action-oriented groups tend to benefit from them.
- Will meetings be in-person, virtual, or hybrid?
- Who will facilitate, set up the space, and follow up with people between meetings?

To help plan your efforts, use the **Recruitment and Meeting Structure Planning** worksheet in the appendix.

### Budget & Resources

Be realistic about what resources you have or can access. Space, food, technology, stipends, and other expenses may require outside funding.

When you're just getting started, get creative. Can you meet at the library or another free community space? Could you organize a potluck or have a rotating snack host?

## Communications

Communication is key to a successful group. Some things to consider:

- How will you communicate between meetings (email, phone, text, social media)?
- How will you manage communication during meetings?
- If group members speak multiple languages, how will you manage interpretation? (see example below).

***ECO Group Example: Language Interpretation***

One ECO Group included both Spanish-only and English-only speakers. The group used several approaches to support equal participation. Bilingual facilitators presented in both languages, one after the other. For other facilitators or community members speaking in their preferred language, the group used audio devices that connected to live interpretation. When someone spoke in Spanish, English speakers listened to the interpretation through the device, and vice versa.

# Additional Considerations

- Do members need help getting to meetings? If you have the resources, consider offering carpooling or rides by staff, or subsidizing ride-share services.
- Members who provide care for family members may have limited availability. Think about whether you can offer childcare or elder care support, and whether children will be welcome at meetings.

# Worksheets & External Resources

Click the link below to find the following worksheet in the appendix.

**>> WORKSHEET 3: Recruitment and Meeting Structure Planning**

The following are resources from other organizations that you may find helpful. The links below will open in a web browser window.

- **Increasing Participation and Membership** (The Community Tool Box)
- **Putting Together a Team** (AARP Roadmap to Livability Book 1 p. 10-13)
- **Promoting Participation Among Diverse Groups** (The Community Tool Box)
- **Community Engagement Toolkit** (Collective Impact Forum)
- **Developing An Organizational Structure for the Initiative** (The Community Tool Box)

# Step 3. Growing Your Group: Building Relationships & Trust

## Guiding Questions

1. How can you build energy and connection at the start and throughout each meeting?
2. How will you make members feel cared for and respected?
3. How can you get members involved and invested in the group’s work?
4. Are there opportunities for peer leadership?
5. What accommodations will make the experience positive for older adults?

## Moving at the Speed of Trust

A key takeaway from the ECO Group project was the importance of building trust within the groups before tackling big issues. **One group described this as “moving at the speed of trust.”**

While groups’ focus on creating social connections versus community action may vary, trust and belonging are essential. Early meetings are an opportunity to build a joyful experience for members. Consider incorporating fun social activities and fostering an open environment where everyone looks forward to showing up, feels heard and respected, and starts to care about each other.

Trust-building will look different depending on your community, its values and history, and the people in the room. It will also depend on whether relationships already exist among members and organizers. Trust-building starts *before* the first meeting, in how you recruit, how welcoming your space feels, whether you offer language access, and how clearly you communicate.

Activities that foster belonging and respect are especially important as members begin to build relationships with one another, but they remain important throughout the group's life. Pay attention to what people respond to. What energizes people? What leaves them bored and disengaged? After an intense or emotionally heavy meeting, follow up with something that can lower stress or help people recharge.

A simple feedback tool like the **How Did Today Go For You? Member Experience Survey** in the appendix can provide immediate feedback to help you plan better meetings.

# Creating a Welcoming Environment

A well-run meeting that centers around member needs and preferences helps members participate fully. Clear and detailed pre-meeting communication helps people feel confident and prepared. Key points to communicate include:

- Directions
- Parking
- Transportation options
- Tech instructions (for virtual meetings)
- Reminder texts or calls, which members of the original ECO Group project appreciated.

There are many ways to create a joyful, welcoming meeting environment. ECO Group staff highly recommended incorporating music, food, and social activities.

### Ideas for Creating Joyful Meetings

- Offer culturally appropriate, varied foods.
- Begin with music and movement, with accommodations for a range of mobility.
- Mix fun or relaxing activities with presenters or substantive discussions.

- **Music.** Many groups began meetings with music, movement, and relaxation opportunities. Be sure to consider participants' mobility needs.
- **Food.** Snacks or meals are another key element. Offer culturally appropriate food and get member feedback about foods they'd like at future meetings.
- **Social activities.** Incorporating social activities can help build relationships, connections, and trust.
    - Bingo games with themes like Black History Month
    - Arts and crafts
    - Gardening activities and information
    - Show and tell

*Sankofa ECO Group members play bingo*

- **Speakers.** Consider inviting speakers who can present on community issues or be more focused on general topics like supporting older adults' physical and mental health.

## Create Ownership

Encourage group members to take on specific roles through volunteering or assignment so everyone has a sense of purpose and group ownership. One ECO Group fostered engagement by assigning responsibilities to each member. Examples include:

- Making reminder calls to other group members
- Taking notes
- Setting up and breaking down the meeting space
- Facilitating discussions
- Bringing or coordinating food

> ***ECO Group Example: Cooking for the Group***
>
> One member really liked bringing food she had cooked to supplement the lunch provided at meetings. She loved cooking, and cooking for the group gave her a meaningful way to share with and care for other members. The group's openness to this contribution made her feel special—a good reminder that flexibility around how members contribute can strengthen connection.

## Fostering Respectful & Inclusive Engagement

People engage in different ways. Some prefer to listen; others want a more active role. Groups should allow for different engagement styles, but it is important to prevent a few voices from dominating. Structured activities can help everyone feel comfortable speaking up. For example:

- Small group discussions allow quieter members to participate more easily.
- Pair and share activities, where pairs talk and then one person shares back to the larger group, give everyone a chance to have their ideas heard.
- Rotating speakers when sharing out conversations from small groups ensures that the same people are not always at the front.

Alongside formal meeting structures, smaller gestures matter too. Reminder calls, help with transportation, and genuine check-ins on members' preferences signal that organizers care. Brief end-of-meeting surveys or informal conversations about food or music choices help show you care, foster a sense of safety in the group, and demonstrate your commitment to the group.

Use the **Group Norms Co-Creation Guide** in the appendix to help develop norms that support effective, respectful group functioning.

## Treating Community Members with Care

**Accommodation:** Being responsive to members' physical needs at every stage of the ECO Group process communicates that the group values everyone who shows up. To make sure your group is truly accessible, consider:

- **Mobility**
    - Choose ADA-accessible locations (avoid stairs or uneven terrain).
    - Arrange seating so that members using mobility devices can move freely and choose where to sit.
    - Make sure all planned activities work for a range of physical abilities.
- **Hearing**
    - Use sound amplification when possible.
    - Take turns speaking; avoid multiple people speaking at once.
    - Use closed captioning when playing videos.
- **Visual materials**
    - Use large sans-serif fonts with clear contrast in printed or projected materials.

> ***ECO Group Example: Taking Time***
>
> One ECO Group realized after a few meetings that they weren't ready to move on from relationship-building. For an 18-month project, they needed a full 6 months to build trust before they could identify a community priority and explore solutions. Relationship-building activities continued throughout the project, but this early investment in trust-building was essential to everything that followed.

Use the **Meeting Accessibility Checklist** in the appendix to make sure you're maximizing accessibility.

**Trauma-Informed Approaches:** Treating members with care also includes being as trauma-informed as possible. That means recognizing that some topics or activities may be very sensitive for certain group members. For example, communicate to group members in advance if a speaker plans to discuss a topic that may trigger bad memories or emotional reactions. Also, make sure to respect people's boundaries and preferences for physical touch. Encourage members to ask before hugging or touching others. If any group activities involve person-to-person contact, make it easy to opt out, or provide alternative ways to participate.

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***ECO Group Examples: Being Responsive to Group Needs***

**Tackling Trauma:** In one meeting, an ECO Group speaker led a long discussion on traumatic structural injustices in the community. While this was an important topic, the group was already acutely aware of the injustices and focusing on it for an entire meeting created negative emotions that needed to be addressed.

**Additional Activities:** Another ECO Group's members were doing physical labor and needed to practice some self-care for their bodies. Organizers brought in someone to provide Reiki massages. While the group had to find extra money to support this previously unplanned activity, facilitators realized how important it was to group member health.

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## Worksheets & External Resources

Click the link below or find the following worksheet in the appendix.

**>> WORKSHEET 4: How Did Today Go for You? Member Experience Survey**

**>> WORKSHEET 5: Group Norms Co-Creation Guide**

**>> WORKSHEET 6: Meeting Accessibility Checklist**

The following are resources from other organizations that you may find helpful. The links below will open in a web browser window.

- **Conducting Effective Meetings** (The Community Tool Box)
- **Accessible Meetings, Events, and Conferences Guide** (Mid-Atlantic ADA Center)
- **Community Guide to Accessible Events & Meetings: Meeting The Needs of People with Disabilities** (Age Friendly Seattle)
- **Icebreakers and Energizers** (California Academy of Sciences)

# Step 4. Identifying & Prioritizing Health Inequities

## Guiding Questions

1. What health equity issue do you want to focus on?
2. What information sources are available for describing the issue? Do you need to collect data to show the scope or impact of the problem?
3. Is a particular subgroup disproportionately impacted by this issue?
4. How feasible is it to address the issue?

You may have started your ECO group with a specific idea of what it will look like and do, but it's important to stay open to refining or changing that vision based on what members identify as priorities. A participatory approach builds shared ownership and leads to solutions grounded in the community's context, priorities, and assets.

## Identifying and Defining a Health Equity Issue

When starting your ECO Group, you may have identified a broad community concern, like neighborhood air pollution. But to take meaningful action, your group will need to get more specific, clearly define the issue, and agree on a shared focus. As you begin discussing potential health equity topics, a little homework—individually or as a group—can provide a deeper understanding and quantify the issue. To define your issue, think about questions such as:

- What is the specific health issue?
- Who does it affect?
- How many people experience the issue in your area?
- What causes the issue?

### What is Health Equity?

"Health equity is the state in which everyone has a fair and just opportunity to attain their highest level of health. Achieving this requires focused and ongoing societal efforts to address historical and contemporary injustices; overcome economic, social, and other obstacles to health and healthcare; and eliminate preventable health disparities." (CDC, 2024)

Achieving health equity requires understanding differences between groups. Breaking down high-level health information into smaller subgroups like age, gender, ethnicity, or region can reveal important differences that are hidden by averages. For example, a city's income might be rising on average, but a specific neighborhood or group might be falling further behind. Identifying these differences will help you shape targeted solutions and advocate for resources where they needed most rather than applying a "one-size-fits-all" approach.

Information on health and health disparities can be found in many places. Examples include:

- **State, county, or city health departments**: Health indicators on a variety of issues.
- **State, county, or city human services departments**: Information on aging, disability, social needs, and programs.
- **Census data**: Demographic information on your community and the United States at the Bureau of Census website.
- **County Health Rankings & Roadmaps:** The University of Wisconsin's County Health Rankings website provides health rankings for most U.S. counties. It includes information on health behaviors, clinical care, social and economic factors, and the physical environment. This can help illustrate what we know about what is making people sick or healthy, including how our environment influences how healthy we are and how long we live.
- **Nonprofit social service agencies:** Agencies such as the United Way and food banks provide reports on a variety of different health and social issues.
- **Centers for Disease Control & Prevention (CDC)**: The CDC provides national information on the rates of many diseases.
- **Specialized local, state, or national organizations**: Search online for organizations focused on your area of interest with helpful reports or other data.

These sources can provide a solid base of information on your topic. However, you may want to collect additional information from the community. Members of your ECO Group may know local people or organizations with relevant information. Listening to the community is central to identifying what matters most. To capture diverse perspectives, consider:

- Public forums
- Listening sessions
- Interviews
- Surveys
- Focus Groups

These participatory approaches can help surface priorities. They also build trust and engagement among key players. Identifying priority populations and subgroups that interventions should elevate can help ensure your efforts are inclusive and responsive to those most in need.

After collecting information on health equity issues, work with your group to refine the priorities you will address.

Use the **Health Equity Issue Prioritization Worksheet** in the appendix to help guide your discussion.

## Developing Ideas

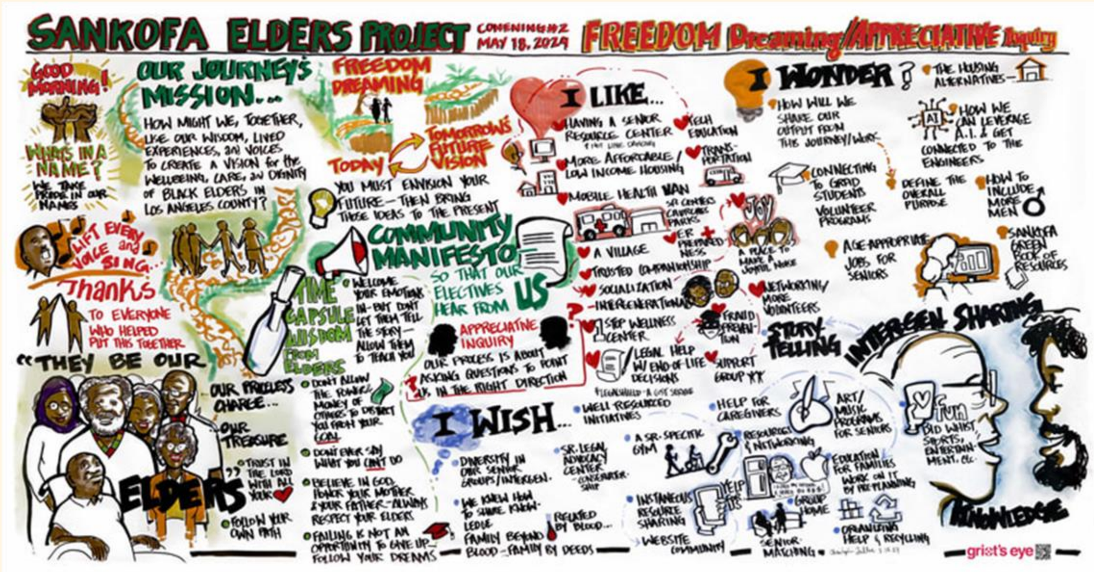
The California ECO Groups took a variety of approaches to developing ideas for health equity issues to focus on, for example:

- Brainstorming about their community's health equity needs and capturing ideas with whiteboards and photos, which could be used for reference notes or as art for installations or protest signs.
- Discussion groups using a book club format to introduce new topics or current events.
- Field trips and group outings to public spaces where members could assess possible accessibility issues for older adults.


*Imperial Valley ECO Group brainstorming*

> ***ECO Group Voices***
>
> "Health equity can take a lot of forms. Personally, we have a lot of people that aren't able to have their basic needs met. [Like] adequate food, and they live in inadequate housing conditions, whatever [it] may be. That's a large population of our community, unfortunately. Even with those two very basic needs not being met, they still want green space. They want an area to go and talk to people. They want yoga class. They want that social interaction, that opportunity, within their community. To me, if I'm hungry, I can't think about anything else. It's like, 'No,' they see beyond their basic needs. I think it's also a testament to that socializing also being a basic need."
>
> *- Imperial Valley ECO Group Staff*

***ECO Group Example: Freedom Dreaming***




Based on concepts from Robin D.G. Kelley's book Freedom Dreams: The Black Radical Imagination, one ECO Group explored health equity through imagining a future that is rooted in joy, justice, and possibility; one free of racism, classism, and all the other forces that conspire against marginalized communities. Kelley encourages community collectives to create spaces where imagination can thrive, and to see dreaming as the first step toward action, not escapism.

# Worksheets & External Resources

Click the link below to find the following worksheet in the appendix.

**>> WORKSHEET 7: Health Equity Issue Prioritization Worksheet**

The following are resources from other organizations that you may find helpful. The links below will open in a web browser window.

- **County Health Rankings** (University of Wisconsin Population Health Institute)
- **Analyzing Problems and Goals** (The Community Tool Box)
- **Racial Equity Toolkit** (Collective Impact Forum)
- **Freedom Dreams: The Black Radical Imagination** (Robin D.G. Kelley, 2003)
- **Community Listening Session Toolkit** (AARP Roadmap to Livability)

# Step 5. Understanding the Community & Key Players

## Guiding Questions

1. Who makes up your ECO Group's community?
2. Who are the key players involved with the issue you identified in Step 4, and what matters to them?
3. What assets exist in the community that could help address the issue?

Effective action begins with understanding, and understanding requires listening, learning, and leveraging the strengths that already exist within the community.

### Who makes up the impacted community?

Begin by describing the community affected by the health issue you chose in Step 4. Establishing a shared understanding of your community's makeup and history will lead to a stronger platform from which to take action. The community mapping process can include:

- **Demographics** (race/ethnicity, age, income, education, political affiliations, etc.)
- **Economics** (major employers & industries, unemployment, etc.)
- **Equity & social factors** (current or historical issues related to race, ethnicity, gender, sexuality, age, disability, or other factors)
- **Government structure and key decision makers**
- **Geographic and environmental features** (urban-rural classification, major natural features, climate, etc.)
- **Major historical events in your community**

Much of this work may already have been done for you. Wikipedia, civic organizations, colleges and universities, and local governments have a wealth of potentially helpful information and reports. Consider selecting a few resources for group members to review. Then discuss whether they reflect the group's lived experiences and views on the most important and relevant factors that could influence your group's work.

This step brings together the research you've already done to identify a priority health equity issue. Collaborating with other community groups can provide a broader perspective on the feasibility of tackling that issue.

### Power Mapping: Who are the key players involved with the issue, and what matters to them?

Power mapping is a simple but powerful tool for designing solutions and strategies for change by mapping relationships, power, and motivations. It involves identifying the individuals and organizations involved in your issue, determining who has the power to make the changes you want to see, and understanding their concerns. This strategy helps change-makers understand complex power dynamics, find leverage points, and focus on the decision-makers who can make your goals a reality.

## Key Aspects of Power Mapping

Once you've identified your health equity issue, the next question is: *who has the power to change it?* The answer isn't always obvious. Keep in mind that the person with the official title may not really call the shots. Sometimes, a quiet but well-connected community member can open a door that no amount of formal lobbying can. Power mapping can help you figure all of this out before spending time and energy going after the wrong target.

The idea is to draw a picture—literally or figuratively—of the people and organizations connected to your issue who support you, who might push back, and who has the ear of the decision-makers you need to reach. By making those relationships visible, your group can make smarter decisions about where to focus and how to build connections that will move your issue forward.

After reviewing the steps below, use the **Power Mapping Worksheet** in the appendix to think through power relationships before drawing your map.

### 1. Identify the Key Decision Maker

The first and most important step in power mapping is identifying the person or people with the authority to grant or block the change you are seeking. This could be an individual such as a mayor, agency director, or CEO, or an organization like a city council, school board, or regulatory agency. Make sure you understand the decision-making process to avoid targeting the wrong person.

### 2. Map Key Players

After identifying the key decision-maker(s), the next step is to map all relevant players connected to the issue or the decision. Including members of your group will help reveal your relationship to the key player, and how you can leverage your connections. Your ECO Group may be closer to the key decisionmaker than you think! This is a brainstorm, so think big!

Key player categories include:

- **Allies:** Individuals or organizations already aligned with your goal. These players can provide credibility, resources, access, or public support.
- **Opponents:** Those who benefit from the status quo or actively resist your proposed change. Understanding their motivations and sources of power is essential.
- **Influencers:** Players who may not take a public stance but shape the target's thinking. These might include advisors, donors, unions, community leaders, professional associations, or media outlets.

## 3. Assess Influence and Support

For each key player, think about two key dimensions of their sphere of influence:

- **Level of influence or power**: High influence (direct access to the key player, formal authority, or significant social, political, or economic leverage) or low influence (limited access or indirect impact, but potentially important in numbers or visibility)
- **Position on the issue**: Supportive, opposed, or neutral/undecided

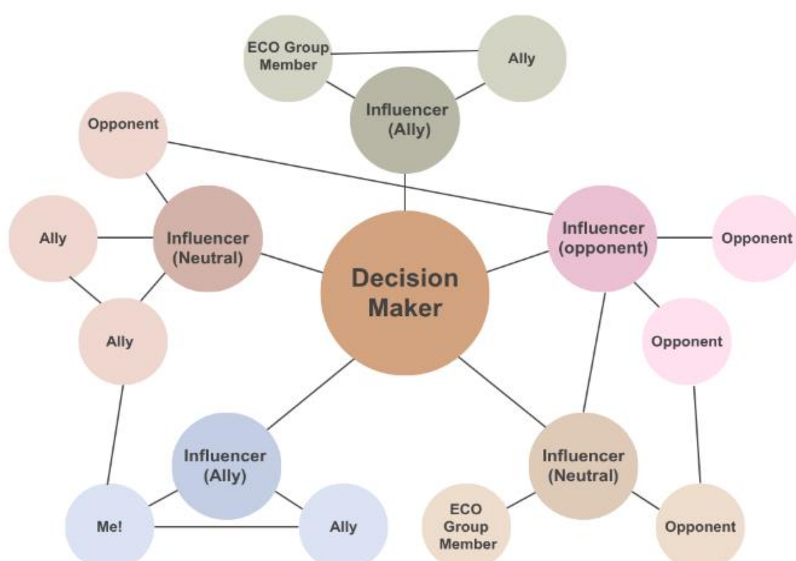
This assessment helps distinguish between key players who are loud but powerless and those who are quiet but influential.

## 4. Visualize Relationships

Power mapping is most useful when relationships are visualized. Diagrams such as grids, flow charts, or network maps make influence patterns easier to see and discuss.

Effective visual maps show:

- Lines of influence between players
- Strength or direction of relationships
- Clusters of aligned interests
- Gaps where relationships are weak or nonexistent




*Power Mapping Example*

Visualization supports shared understanding within your group and helps avoid assumptions based on incomplete information.

### 5. Develop Strategy

The final step is translating analysis into action. A completed power map should directly inform strategy by answering key questions:

- Who has the most influence on the key decision-maker?
- Can you reach or influence the key decision-maker directly, or would it be better to work through other people or organizations they are more likely to listen to?
- Where should you focus resources to build new allies or strengthen existing ones?
- How can opposition be neutralized, divided, or reduced in impact?

> ***ECO Group Voices***
>
> "…focus groups [helped] to figure out what was needed in their community, what was lacking in their community, and then come up with interventions. They recently presented them to…people from the community.
>
> We had some people from the [San Francisco] Department of Public Health, people who work in aging services in the community, people who work in aging services like at [University of California, San Francisco] and [University of San Francisco]. People who are not necessarily heads of department of public health or heads of these agencies, but people who deal with these agencies—it's hard to explain. They're not these big huge people, but they also do hold some power. They're more of the grass tops where our folks are the grassroots. They got some feedback from there and they're now prototyping their interventions. That's where we're headed."
>
> *-Booker T. Washington ECO Group Staff*

## Worksheets & External Resources

Click the link below to find the following worksheet in the appendix.

**>> WORKSHEET 8: Power Mapping Worksheet**

The following are resources from other organizations that you may find helpful. The links below will open in a web browser window.

- **Power Mapping** (Beautiful Trouble)
- **Assessing Community Needs and Resources** (The Community Tool Box)
- **Power Mapping and Analysis** (The Commons Social Change Library)
- **Mapping Social Change Networks** (Engage R&D)

# Step 6. Designing & Testing Solutions

## Guiding Questions

1. What have other communities done to address health equity issues like yours?
2. How can you involve all group members in developing and refining ideas?
3. How could the solution be scaled up or down to match the resources you have available?
4. How can you get feedback from key players on your ideas?

## What have other communities done?

After you've identified your health equity issue and identified important players in your community, it's time to start designing and prototyping solutions. The good news is that you don't have to start from scratch. Other communities have likely identified similar issues and tried different solutions. Learning what worked and what didn't, and adapting solutions to fit your community, is a good starting point. One good resource is the CDC's Community Guide, a collection of evidence-based recommendations for tackling a wide range of health issues. You likely also came across other action ideas while researching your health equity issue.

Once you find one or more ideas, engage your group in thinking about how those actions might work in your community and with the key players from your power mapping. When developing or adapting a solution, co-design is a great approach to ensuring it is right for your community.

## Guide to the Co-Design Process: 4 Key Steps

Co-design sounds academic, but the core idea is simple: the people most affected by a problem have real-world insight into how to solve it and should have a real say. Not just a chance to comment on someone else's plan, but a genuine seat at the table from the start.

In practice, this means:

- Slowing down before jumping to solutions
- Asking questions before making decisions
- Being genuinely open to what you hear

- Making it easy for the right people to participate—not just the loudest or most available voices, but the people whose lives and experiences are most relevant to the issue

The steps below walk through the co-design process. They won't apply equally to every group or situation, and you don't need to follow them in lockstep. But taken together, they describe what it looks like when a community is truly driving the process, rather than being consulted after the fact.

**Resource:** After reviewing the steps, use the **Co-Design Facilitator Checklist** to help make sure you're staying true to the spirit of co-design.

## 1. Intentionally Involve Users

A key component of any co-design process is to intentionally involve individuals or groups who will ultimately use, experience, or be impacted by the solution. Begin early and continue this involvement throughout the process, rather than just a single consultation or feedback session.

Intentional involvement means:

- Recruiting participants who reflect the diversity of the affected community
- Removing barriers to participation (for example, offering compensation, childcare, transportation, or flexible meeting times)
- Creating spaces where participants feel safe, respected, and heard

Co-design is not about tokenism. Participation must be meaningful, with clear opportunities for community members to shape decisions rather than merely react to predetermined ideas.

## 2. Resist Jumping to Decisions and Solutions

Another defining feature of co-design is **gathering feedback and insights before making major design decisions**. In traditional design processes, solutions are often developed internally and then tested with users near the end. Co-design reverses this sequence.

By holding back from decisions:

- Assumptions can be challenged before they become embedded
- Emerging needs and priorities can shape the direction of the work
- The process remains flexible and responsive rather than rigid

This stage often involves activities such as listening sessions, interviews, workshops, journey mapping, or storytelling exercises. The goal is not to validate existing ideas, but to learn directly from participants about their experiences, challenges, and aspirations.

## 3. Synthesize Feedback into Insights

Gathering feedback alone is not sufficient. Effective co-design involves **synthesizing participant input into shared insights** that can inform decision-making. Synthesis includes identifying patterns, themes, tensions, and opportunities across what participants have shared.

Effective synthesis:

- Centers participant voices rather than selectively highlighting convenient feedback
- Is transparent and collaborative, often involving participants in sense-making
- Distinguishes between symptoms and root causes of problems

This phase translates qualitative input into actionable insights while preserving the complexity and nuance of lived experience.

## 4. Develop Solutions Based on Feedback

The final component of co-design is **developing solutions grounded directly in participant feedback and insights**. Ideas are generated, refined, and tested collaboratively, often through prototypes, pilots, or iterative drafts.

In strong co-design processes:

- Participants help evaluate and refine solutions
- Feedback continues even after initial implementation
- Learning and adaptation are ongoing

*ECO Groups Meet to Discuss Successes and Challenges*

Co-design is not a one-time activity, but an evolving partnership. When done well, it builds trust, increases effectiveness, and leads to outcomes that better reflect the real needs and strengths of the community.

> ***ECO Group Voices***
>
> "I think the next steps…there's going to be honing these. Prototyping and then honing the intervention again. Taking the feedback they received from the grass tops was basically figuring out more of the details—Who's going to be staffing these? Who are they getting the training from? Are they going to be paid for this training? Where's this funding coming from? Who is going to be funding these things? These are the questions they're going to be thinking about.
>
> Then, prototyping it. Literally putting out two chairs in the Booker T lobby on a Tuesday, staffed by the ECO group members, seeing how this works. Doing the same thing at a neighboring center."
>
> *-Booker T. Washington ECO Group member*

## Worksheets & External Resources

Click the link below to find the following worksheet in the appendix.

**>> WORKSHEET 9: Co-Design Facilitator Checklist**

The following are resources from other organizations that you may find helpful. The links below will open in a web browser window.

- **The Community Guide** (CDC)
- **Criteria for Choosing Promising and Community Interventions** (The Community Tool Box)
- **Co-Design: Engaging People with Lived Experience** (Community Commons)

# Step 7. Taking Action

## Guiding Questions

1. What specific goals must be met to achieve your group's vision?
2. What actions will your group take to move towards each goal?
3. Who will take these actions?
4. What resources do you need for these actions?
5. When will these actions take place?
6. How will you track progress and communicate with your group members to make sure things get done?

## Developing an Action Plan

Earlier in this toolkit, we walked through how to develop a shared vision, design solutions to the health equity issues your group identified, and map out resources and decision-makers. Now it's time to put it all together into an action plan! Your action plan will include goals, strategies, and action steps.

## SMART Goals

A shared vision shows you what a better world looks like, but not how to get there. It's important to have clear goals for what improvement looks like along the way. Clear goals will help you plan your actions and understand if you're making progress. A common approach to defining goals is to make them **SMART**:


- **S**pecific: Clear goals that identify the who, what, where and when of the changes you want to see.
- **M**easurable: What is something concrete you can measure that would show success?
- **A**ction-oriented: Goals should be clearly tied to actions you can take.
- **R**ealistic: Goals should be ambitious but achievable.
- **T**imely: Break up goals into short, medium, and long-term. Achieving long-term goals is almost always dependent on achieving smaller, short-term goals, so it is

good to focus most of your energy and planning on what you can do over the next few weeks or months, not years.

In the example in the Action Tracking Worksheet, the goal is to “Get the city to hire two bilingual outreach workers to connect older adults with resources.”

## Creating Strategies

With your SMART goals in place, you can start developing strategies to achieve them. Strategies are more specific and detailed than goals but may have several related actions below them.

Use the **Strategy Worksheet** in the appendix to brainstorm potential strategies with your group and consider pros and cons.


*Sankofa ECO Group Members Meet With City Leaders*

In our example, one strategy is for ECO Group members to call their city council representatives. However, the group may need to take certain actions before making those calls. For example, developing talking points to make sure everyone has the same message and is comfortable contacting their councilperson.

## Planning Action Steps

With your SMART goals in place, you can create action steps that describe:

- Each specific action
- Who will do it
- When it will happen
- What resources they need to do it
- How you will track and communicate progress

Start by filling out the simple **Action Tracking Worksheet** in the appendix. If you find yourself writing a lot, you may need to break your actions into smaller steps. The simpler and clearer you can make actions, the more likely they are to get done.

## Tracking Progress

Once you begin taking action, it's important to track your progress and communicate regularly within the group. Regular communication helps ensure accountability, identify when someone might need support, and create opportunities to change course if a strategy isn't working.

Use the **Action Tracking Worksheet** in the appendix to keep track of your progress.

***ECO Group Example: Leveraging ECO Group Membership***

One ECO Group member shared that they were able to use their ECO Group affiliation to help make their voice heard. When they called the city to fix the signage at a bus stop, they identified themselves as part of the ECO Group to emphasize the importance of the request. The city fixed the sign.

## Worksheets & External Resources

Click the links below or find the following worksheets in the appendix.

**>> WORKSHEET 10: Strategy Worksheet**

**>> WORKSHEET 11: Action Tracking Worksheet**

The following are resources from other organizations that you may find helpful. The links below will open in a web browser window.

- **Developing the Action Plan's Strategies and Tactics** (AARP Roadmap to Livability Collection, p. 32)
- **Developing an Action Plan** (The Community Tool Box)

***ECO Group Voices***

"The more we participate…the more positive change is possible in the community."

*– Northern Sonoma ECO Group member*

# Step 8. Evaluating & Communicating Progress

## Guiding Questions

1. What counts as success?
2. What is important to measure?
3. How will you track progress toward your goals?
4. How will you communicate progress with your group and beyond?

Even when you are just getting started, it is helpful to think through what success looks like and how you will know you're making progress. While evaluation can be complex, it doesn't need to be overly technical or resource-intensive to be useful. For many ECO Groups, evaluation simply means paying attention, documenting what is happening, and reflecting together on what's working and what isn't. When developing an evaluation plan, think through these three main things:

- Who is my audience?
- What questions will help me understand my progress or impact?
- What information will help me answer those questions, and how can I collect that information?

## Evaluation Audience

Before deciding what to track or how to communicate, consider who the evaluation is for. Different audiences care about different things and respond to different kinds of information.

For example:

- **ECO Group members** may want to know if their time and effort are making a difference and how decisions are being made.
- **Community partners** may be interested in how the work aligns with shared goals or community needs.
- **Funders or potential supporters** may look for evidence of impact, learning, and momentum.

Being clear about your audience can help you focus your evaluation efforts and avoid collecting information that is not useful. In many cases, the most important audience is the group itself. Evaluation can be a tool for learning and accountability within the group, not just a reporting requirement for others.

# Evaluation Design

A good starting point is to align your evaluation approach with the goals and action steps your group has already identified. If your group created SMART goals and an action plan, those tools can also serve as the foundation for evaluation. Tracking whether actions were completed, who participated, and what outcomes followed can provide insight into progress over time.

Evaluation activities generally fall into two broad categories:

- **Quantitative information**, or things you can count (for example, number of meetings held, number of participants attending an event, number of decision-makers contacted).
- **Qualitative information**, or things that capture experiences and meaning (for example, stories, quotes, photos, reflections from group members).

A mix of the two is often most helpful. Numbers can show scale or momentum. Stories and examples can help explain why the work matters and how it affects people's lives.

Keep in mind that building trusting relationships and an effective, functioning group are important goals and foundational to taking successful action in the community, even if they are harder to measure.

Visit the additional resources at the end of this section for more ideas about how to design evaluations and collect information on the impact of your group activities. Use the **Evaluation & Progress Tracking Worksheet** in the appendix to help plan your evaluation.

# Communicating Progress

Regularly communicating progress helps sustain engagement, reinforce accountability, and build shared ownership of the work. Communication does not always need to be formal or polished—what matters most is that it is timely, clear, and accessible.

After reading the rest of this section, use the **Communications Planning Worksheet** in the appendix to help develop your communications strategy.

Within the group, progress can be shared through:

- Brief check-ins during meetings
- Visual tracking tools such as charts or timelines
- Updates tied directly to action steps ("What did we say we would do, and what happened?")

Beyond the group, sharing progress can help build credibility, attract partners, and support long-term sustainability. Communication might include:

- Short summaries or updates for partners or funders
- Photos or stories shared through newsletters or social media
- Presentations or testimonials at community events or meetings with decision-makers

When communicating progress, it can be helpful to balance honesty with celebration. Naming challenges and setbacks alongside successes helps build trust and shows that learning is part of the process. Highlighting concrete examples—such as a policy change, a new partnership, or a story of individual impact—can make progress feel real and tangible.

*Pictures Can Be Valuable Communications Tools*

Finally, closing the loop is critical. When group members share input, take action, or contribute ideas, make sure to communicate back how that input was used and what resulted. This reinforces respect, transparency, and continued engagement.

## Worksheets & External Resources

Click the links below to find the following worksheets in the appendix.

**>> WORKSHEET 12: Evaluation & Progress Tracking Worksheet**

**>> WORKSHEET 13: Communications Planning Worksheet**

The following are resources from other organizations that you may find helpful. The links below will open in a web browser window.

- **Determine the Evaluation Process** (AARP Roadmap to Livability Collection, p. 36)
- **Developing an Evaluation Plan** (The Community Tool Box)
- **Collect Meaningful Data** (The Capacity Collective)
- **Developing a Plan for Communications** (The Community Tool Box)

# Step 9. Sustainability

## Guiding Questions

1. What resources does your ECO Group need to achieve its goals?
2. What internal resources do you have available?
3. What are potential external sources of funding and other resources?

In the beginning, your ECO Group may not need much more than place to meet, some snacks, and one or more people to organize and facilitate meetings. But if the group, its goals, and strategies continue growing, you may need to seek funding for space, staff, equipment, or other resources.

## Assessing Resource Needs

As you form your group, it can be helpful to start tracking what goes into making it all happen. How many people and how many hours does it take to organize and run meetings, and to communicate with members in between? What are your space and equipment needs? How much are you spending on food and meeting supplies? And as you begin identifying priorities and developing strategies, think through what resources you'll need to make them happen.

## Identifying Available Assets

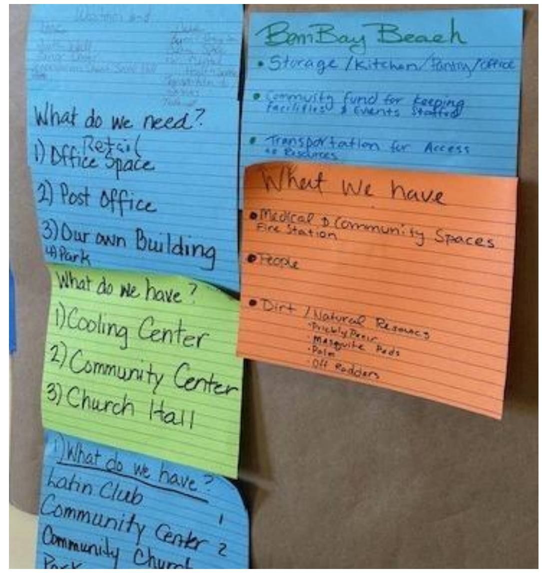
Your group members and community can be valuable sources of assets that can keep your costs down.

After reading this section, use the **Resource Needs & Assets Worksheet** in the appendix to see how your needs and assets match up, and where you may need additional support.

- **Individual & Group Assets:** Group members are often ready, willing, and able to volunteer to help with many tasks—you just need to ask. Document group members' skills, interests and resources to help match people to tasks.

  Engaging group members' skills and assets can make them feel more invested in the group and valued. For example, if someone's a great cook, the group could pay for their ingredients and have them supply food for meetings at a fraction of the cost of a restaurant. Or someone may have a space where the group could meet. Make sure to acknowledge and celebrate all members' contributions!

- **Community Assets:** Free or low-cost resources may also exist in your community. For example, libraries or community centers may offer meeting spaces, skill-building classes, or other services to help build your group's knowledge and capacity for action. Urban areas often have more of these amenities than rural communities, but it's still worth doing some local research and asking group members whether they know of resources that may be hard to find online. For example, religious institutions such as churches may offer their spaces to community groups that are not directly affiliated with them.




*Mapping Resources & Needs*

- **Paid Resources:** If group or community assets won't meet a resource need, you may need to hire a professional or pay for space, equipment, or supplies. If you are working with local businesses, they may be able to offer a special rate, especially if you are a registered nonprofit or if a group member has a relationship with them. For any paid resource, consider whether it is truly necessary or just nice to have, and consider alternatives to keep the price down.

# Seeking External Funding

Once your ECO Group is formed and taking action, you may be thinking about how to sustain the group long-term or expand your reach and impact, which typically require additional resources. Funding options will depend on how your group is set up. If you are part of a nonprofit organization, you can seek government or private grants, and individual and corporate donations to your group may be tax-deductible. If your group is not incorporated, you will be limited to more informal fundraising efforts.

## Membership & Fundraisers

Depending on who your group members are, consider whether a small membership payment is appropriate. Regular small-dollar contributions can provide a stable funding base for expenses like snacks and supplies and ensure those costs don't always fall on certain members. You could also solicit regular contributions from friends and families.

Fundraisers like bake sales and communal yard sales can be good for strengthening group ties and raising some operating funds for the group. However, even small fundraisers can take a lot of effort and only provide one-time income, unlike regular membership payments.

## In-Kind Contributions & Sponsorships

Businesses and people with professional skills may be willing to donate in-kind services or goods to the group at no cost or less than market rate. For nonprofit groups, donations can provide tax benefits for donors. Local businesses may also be interested in sponsoring events or activities, or providing financial support, volunteers, and other resources. Ask your group members about their connections to local businesses—it is much easier to get support with an established connection than with a cold call. Your group members may also have professional skills or businesses you can leverage.

## Grants

Grants can be a great way to get funding support for a project and help grow your group, but consider the following items before starting to research grant opportunities.

- **Consider Your Organization Type:** Government and private foundation grants are generally only available to registered nonprofits. If your ECO Group is part of a larger nonprofit, that organization would serve as the applicant and grant recipient. If your ECO Group is independent, you could consider registering as a nonprofit, but that can take considerable resources. For example, hiring a lawyer, setting up a governance structure, and future work around accounting and taxes.
- **Focus on Discrete Projects:** Almost all funders prefer supporting specific projects over general support for an organization. A well-developed project idea with timelines, activities, staffing, and a budget is key. Don't promise anything you aren't sure you can deliver.
- **Private Foundation vs. Government Grants:** In general, applying for and managing grants from private foundations is much easier than from government sources, but awards tend to be smaller. Given the small, local nature of ECO Groups, you should start your funding search with local or state foundations that are connected to your community and your priority issues. Larger healthcare organizations often have charitable foundations that support local community organizations. Successful business owners often also set up charitable foundations. The same approach applies to government grants. Start local with your city and county governments. Then expand your search to state and regional government before looking at national sources.
- **Seek Funder Alignment:** Review potential funders' websites to see what they have previously funded to assess whether your work is a good fit. Review any available application materials to see what information is required and what criteria are used to make funding decisions. If a contact person is listed, reach

out to them with a brief description of your proposal and ask if they are open to an initial conversation. These conversations can be incredibly valuable, helping ensure you don’t waste time applying to places that aren't a good fit, or getting guidance on how to make your proposal more competitive.

Securing grant funding requires both skill and luck, but perhaps more importantly, perseverance. The most successful grant applicants apply again and again, learning and improving each time. They also seek funds from a variety of funders to increase their chances and avoid becoming too reliant on a single source of funds.

## Worksheets & External Resources

Click the link below or find the following worksheet in the appendix.

**>> WORKSHEET 14: Resource Needs & Assets Worksheet**

The following are resources from other organizations that you may find helpful. The links below will open in a web browser window.

- **Strategies for the Long-Term Sustainability of an Initiative** (The Community Tool Box)
- **Amplify Your Story: Using Data for Grant Writing** (The Capacity Collective)
- **Marketing the Initiative to Secure Financial Support** (The Community Tool Box)

# ECO Group Profiles

## Booker T. Washington ECO Group


**Location:** San Francisco, CA

**Membership:** 19 community members, primarily older Black adults

**Focus area:** Mental Health

**What the group did:**

- Held biweekly meetings with both professional and peer facilitators
- Developed collective governance processes
- Provided monthly stipends to members, which they leveraged to conduct a survey on Universal Basic Income
- Co-designed two culturally congruent interventions:
    - **The Black Line:** A free mental health support line tailored to the Black community (but open to all), staffed by volunteers trained in trauma-informed practices and resource navigation.
    - **The Friendship Bench:** Based on a project in Zimbabwe, this program would bridge the mental health treatment gap in traditionally marginalized populations by connecting people with common mental health challenges to trained volunteers or community health workers.

**Challenges & lessons learned:**

- The group's diversity of lived experience and socioeconomic/educational backgrounds created communication and collective governance challenges. They were able to bring in a trained facilitator to support more productive meetings and worked to connect participants to therapeutic resources and other support services.
- ECO Group participants and facilitators emphasized that building trust and functional groups requires significant time and resources. Dedicating time and effort over the course of the project allowed the group to build relationships.

**Learn more:** Visit the Booker T. Washington Community Service Center website at btwcsc.org.

# Sankofa Elders ECO Group

**Location:** Los Angeles, CA

**Membership:** Intergenerational group of 100+ community members

**Focus Area:** Dignity, care, and well-being of Black Elders in LA County

**What The ECO Group Did:**

- Provided stipends to approximately 40 Sankofa Ambassadors who formed the core of the ECO Group.
- Held monthly meetings of 100+ Ambassadors, community and organizational partners, and volunteers.
- Designed and implemented a culturally responsive version of Appreciative Inquiry, a positive, strengths-based approach to engaging people in self-determined change efforts.
- Conceptualized and officially adopted a Black Eldering Bill of Rights that will serve as a framework to advocate for equitable resources to support the health and well-being of older Black adults and those who care for them.
- Worked with the LA County Board of Supervisors to codify the third Saturday in May as Black Elders Appreciation Day in LA County and direct the County to focus on Black aging and caregiving in its future “State of Black Los Angeles” reports.

**Challenges & Lessons Learned:**

- Fully engaging the Sankofa Ambassadors and community members was key to fostering authentic inclusion in the co-creation process.
- Developing a “sister city”-type relationship with Pasadena Village demonstrated the possibility of expanding the ECO Group's reach and impact.
- Identifying funders and securing ongoing support for this type of group and its work is difficult.

**Learn More:** Visit the California Black Women’s Health Project website at www.cabwhp.org and the Black Eldering Bill of Rights website at www.blackeldering.com.

# Cloverdale ECO Group


**Location:** Northern Sonoma County, CA

**Membership:** 20-25 older adults, primarily Latine and White

**Focus Area:** Housing & Language Justice

**What The ECO Group Did:**

- Met regularly with elders and representatives from seven local organizations.
- Provided stipends to 10 core members.
- Developed and presented a Housing and Tenant Rights petition to the City of Cloverdale.

**Challenges & Lessons Learned:**

- Bringing together multiple organizational partners provided additional connection to resources for group members but created some challenges around establishing equitable roles and responsibilities.
- Members included people whose primary language was Spanish and those whose was English. To facilitate communication between members, group leaders were able to provide simultaneous interpretation services, but this could be a challenge for groups with limited resources.
- As group trust grew, members surfaced significant personal health and social needs along with experiences of discrimination and fear that were often beyond the capacity of the group or its organizational partners to address directly.

**Learn More:** Visit the Healthcare Foundation of Northern Sonoma County at healthcarefoundation.net.

# Imperial Valley ECO Group

**Location:** Imperial County, CA

**Membership:** ~75 active members, 200 community participants

**Focus Area:** Varied by community; overall framework of Communities of Care & Belonging

**What The ECO Group Did:**

- Brought together people in four rural communities with 11 community connectors and over 10 local organizations at regular convenings.
- Launched a monthly senior group that meets for meals and to connect with organizations that provide resources for older adults.
- Partnered with Imperial County to expand cooling center hours.
- Started a weekly coffee club to reduce social isolation and work together to fill out assistance forms.
- Participated in county transportation commission stakeholder workshops.
- Supported the establishment of a remote County Aging and Disability Services site.

**Challenges & Lessons Learned:**

- It is essential to meet people where they are and ensure everyone is on the same page before moving forward.
- Getting information through community conversations and relationship-based approaches can be more effective than more formal approaches like surveys.

**Learn More:** Visit the Imperial Valley Wellness Foundation at www.ivwf.org.

# Appendix. Tools & Worksheets

## WORKSHEET 1: ECO Group Purpose Brainstorming

***Referenced in [Step 1. Understanding Your Purpose](#).***

Use this planning sheet to brainstorm the group's purpose and goals. You can fill this out yourself or, even better, use it as a discussion guide with friends, family, or colleagues.

**What is your overall goal? How would an ECO Group help you meet that goal?**

**What needs will this group fill that aren't being met by other groups?**

**What would success look like…**
**…in six months?**

**…in two years?**

# WORKSHEET 2: Individual/Organization Readiness Self-Assessment

***Referenced in [Step 1. Understanding Your Purpose](#).***

Before forming an ECO Group, honestly gauge your capacity as an individual or organization to form and run a new group. In the worksheet, the term "I" refers to either you or your organization, if you're part of one. If you find yourself checking "no" more often than "yes," you may not be ready to move ahead. If that's the case, consider ways to get to "yes!" on more items.

| | YES | NO |
|---|---|---|
| **OVERALL CAPACITY** | | |
| **Have I done something similar to forming and running an ECO Group before?** | ☐ | ☐ |
| **RELATIONSHIPS** | | |
| **Do I have existing relationships with people in the community who I want to join the group?** | ☐ | ☐ |
| **Do I have connections to any organizations that could help support the group?** | ☐ | ☐ |
| **VOLUNTEER OR STAFF RESOURCES** | | |
| **Do I have time and energy to dedicate to setting up this project?** *For example, recruiting members, finding space, developing materials.* | ☐ | ☐ |
| **Do I have time and energy to dedicate to the ongoing project?** *For example, planning & running meetings, communicating with members.* | ☐ | ☐ |
| **Do I have the right skills for developing and running the group?** *For example, event planning, communications, leadership.* | ☐ | ☐ |
| **FINANCIAL/MATERIAL RESOURCES** | | |
| **Do I have any seed money that I can use to help set up and run the group?** | ☐ | ☐ |
| **Do I have other material resources like meeting space available?** | ☐ | ☐ |

# WORKSHEET 3: Recruitment & Meeting Structure Planning

***Referenced in Step 2. Setting Up Your Group: Recruitment & Formation.***

| | Plan/Goal | Approaches/ Strategies | Potential Challenges & Solutions |
|---|---|---|---|
| **GROUP MEMBERS**<br>• Who would you like to recruit?<br>• Are there people you want to include who may be harder to reach? | | | |
| **RECRUITMENT APPROACH**<br>• What approach(es) fit your community and context?<br>• Can you try more than one approach? | | | |
| **MEETING LOCATION**<br>• What spaces are available?<br>• How much do they cost?<br>• Are they welcoming and inclusive? | | | |
| **POTENTIAL PARTNERS**<br>• Which organizations could support recruitment, space, or other needs? | | | |
| **MEETING FREQUENCY AND TIME**<br>• What works best for your members?<br>• Is there variation within your group? | | | |
| **INCLUSIVITY AND ACCESSIBILITY**<br>• Consider transportation, childcare and other caregiving responsibilities, language access, mobility, acoustics, accessibility, and other needs. | | | |
| **ADDITIONAL NEEDS**<br>• What else will help members attend and participate? | | | |

# WORKSHEET 4: How Did Today Go For You? Member Experience Survey

***Referenced in [Step 3. Growing Your Group: Building Relationships & Trust](#).***

This quick survey can be handed out at the end of each meeting to get a sense of how people felt about the meeting and gather ideas for what to do differently next time.

## How well do you feel you were heard?

## How much did you enjoy the activities?

**What would you change?**

**What would you like to see next?**

# WORKSHEET 5: Group Norms Co-Creation Guide

***Referenced in [Step 3. Growing Your Group: Building Relationships & Trust](#).***

**Group Norms**

Group norms are guidelines for how group members interact with, listen to, and communicate with each other. Setting and reflecting on group norms helps clarify expectations for members and create an inclusive, respectful environment.

**Co-Creation**

Members may want to create a list of group norms together. Co-creating these norms can help create buy-in and ensure member values are reflected.

**Establishing Group Norms**

- Facilitate a conversation with the group:
    - Explain the purpose of establishing a set of group norms
    - Explain the purpose of co-creating these norms
    - Review any previous lists of group norms
    - Allow for disagreement in conversations
- Come to a group consensus before finalizing norms for adoption
- Create a group norms document that can be distributed to all members
- Review norms at the beginning of meetings
    - You can also post norms in a visible place in the meeting space

**Examples of Group Norms**

| | | |
|---|---|---|
| Everyone here is wise. | We need everyone's wisdom for the greatest results. | Every idea is valuable. |
| There are no wrong answers. | The sum of the whole is greater than the sum of the parts. | Everyone will hear and be heard. |

# WORKSHEET 6: Meeting Accessibility Checklist

***Referenced in* [*Step 3. Growing Your Group: Building Relationships & Trust*](#).**

Before your first meeting, use this checklist to review your plans to make the gatherings accessible. If your meetings will be held in different locations, you may need to revisit this checklist later.

| | YES | NO |
|---|---|---|
| **PHYSICAL SPACE AND MATERIALS/TECHNOLOGY** | | |
| Venue is ADA-compliant, with accessible entrances, restrooms, and parking | ☐ | ☐ |
| Seating and tables are accessible and have sufficient space between tables | ☐ | ☐ |
| There is space in the room for walking or standing | ☐ | ☐ |
| Service animals are welcome | ☐ | ☐ |
| Background sound level allows for easy conversation (avoid loud restaurants or similar venues) | ☐ | ☐ |
| Sound amplification (microphones, speakers) is available for larger spaces | ☐ | ☐ |
| Documents or presentations are in large, easy-to-read fonts | ☐ | ☐ |
| Closed captioning is provided for any video or audio | ☐ | ☐ |
| **LANGUAGE ACCESS** | | |
| Plans for bilingual facilitation and presentations | ☐ | ☐ |
| If using devices as part of translation, there are enough for the anticipated amount of group members | ☐ | ☐ |
| **CONVENIENCE** | | |
| Child care is offered for group members | ☐ | ☐ |

| | | |
|---|---|---|
| There are multiple transportation alternatives offered to members and support with coordinating transportation (rideshares, carpooling, etc.) | ☐ | ☐ |
| Meetings are held at a time that allows for various work and family schedules | ☐ | ☐ |

**OTHER NEEDS (Other accommodation needs that your members may have)**

| | | |
|---|---|---|
| Need: | ☐ | ☐ |
| Need: | ☐ | ☐ |

# WORKSHEET 7: Health Equity Issue Prioritization Worksheet

***Referenced in [Step 4. Identifying & Prioritizing Health Inequities](#).***

| | **Scope**<br>*How many people in the community are affected by this issue?* | **Severity**<br>*How serious is this issue for the community?* | **Community Priority**<br>*Is this a low, medium or high priority for the community?* | **Feasibility**<br>*How likely is it that the ECO Group can create change?* |
|---|---|---|---|---|
| **HEALTH ISSUE 1**<br>• *Describe issue:* | | | | |
| **HEALTH ISSUE 2**<br>• *Describe issue:* | | | | |
| **HEALTH ISSUE 3**<br>• *Describe issue:* | | | | |



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# WORKSHEET 8: Power Mapping Worksheet

***Referenced in Step 5. Understanding the Community & Key Players.***

Use this worksheet to identify decision-makers, map key players, assess influence, and develop a strategic plan for change.

| **DECISION-MAKING TARGET** | |
|---|---|
| Identify the people or organizations with the authority to enact the desired change. | |
| **Key Decision Makers (Individuals/Organizations)** | **Role/Authority** |
| | |
| | |
| | |

| **KEY PLAYERS** | | | | |
|---|---|---|---|---|
| List all relevant actors and categorize them as allies, opponents, or influencers. | | | | |
| **Person/Group** | **Category** (Ally, Opponent, Influencer) | **Level of Influence** (High, Medium, Low) | **Position** (Support, Oppose, Neutral) | **Relationship to Target** |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

## RELATIONSHIP MAPPING

Describe or sketch how key players relate to one another and to the target. You may draw a diagram or describe influence pathways in text.

## STRATEGIC ANALYSIS & ACTION PLAN

Use the power map to identify leverage points and next steps.

| Who To Contact | Want Do You Want Them To Do? | What Is Your Message? | Who Will Contact Them |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

# WORKSHEET 9: Co-Design Facilitator Checklist

***Referenced in Step 6. Designing & Testing Solutions.***

### 1. Before the Co-Design Process

#### Clarify Purpose & Scope

- ☐ Clearly define the problem or opportunity being explored
- ☐ Identify what decisions are in scope for participants to influence
- ☐ Be explicit about constraints (budget, timeline, policy, authority)

#### Identify & Prepare Participants

- ☐ Identify people most affected by the issue
- ☐ Ensure participants reflect diversity of lived experience, identity, and perspective
- ☐ Remove participation barriers (compensation, transportation, childcare, accessibility, language support)
- ☐ Communicate expectations, roles, and time commitment clearly

#### Design for Shared Power

- ☐ Plan activities that give participants real decision-making influence
- ☐ Avoid pre-determined solutions or leading questions
- ☐ Prepare to share context without steering outcomes

#### Logistics & Materials

- ☐ Select accessible, welcoming locations (physical or virtual)
- ☐ Prepare facilitation materials (agenda, prompts, sticky notes, whiteboards, digital tools)
- ☐ Build in adequate time for discussion, reflection, and breaks

### 2. During Co-Design Sessions

#### Set the Tone

- ☐ Establish shared norms (respect, curiosity, confidentiality, listening)
- ☐ Name power dynamics explicitly and affirm participant expertise
- ☐ Reinforce that lived experience is valid and valuable knowledge

**Facilitate Inclusive Participation**

- ☐ Ensure all voices are heard (not just the loudest or most confident)
- ☐ Use multiple engagement formats (small groups, writing, visuals, storytelling)
- ☐ Monitor and address dominance, disengagement, or exclusion

**Gather Meaningful Input**

- ☐ Ask open-ended questions focused on experiences, not solutions
- ☐ Encourage participants to describe challenges, needs, and aspirations
- ☐ Capture input accurately and visibly (notes, charts, shared screens)

**Delay Design Decisions**

- ☐ Resist pressure to finalize solutions too early
- ☐ Treat ideas as hypotheses rather than conclusions
- ☐ Check assumptions with participants before moving forward

## 3. After Co-Design Sessions

**Synthesize Feedback Thoughtfully**

- ☐ Review all participant input without filtering prematurely
- ☐ Identify themes, patterns, tensions, and contradictions
- ☐ Distinguish root causes from surface-level symptoms

**Validate Insights**

- ☐ Share synthesized insights back with participants
- ☐ Ask: "Does this reflect what you meant?"
- ☐ Revise interpretations based on participant feedback

**Develop Solutions Collaboratively**

- ☐ Translate insights into solution concepts or prototypes
- ☐ Involve participants in evaluating trade-offs and feasibility
- ☐ Test and refine solutions iteratively

## 4. Ongoing Accountability & Reflection

### Close the Feedback Loop

- ☐ Communicate how participant input influenced decisions
- ☐ Explain transparently when suggestions cannot be implemented and why
- ☐ Share next steps and timelines

### Evaluate the Process

- ☐ Reflect on who participated and who did not
- ☐ Assess whether power was meaningfully shared
- ☐ Identify improvements for future co-design efforts

### Sustain Relationships

- ☐ Maintain communication beyond the project
- ☐ Recognize and credit participant contributions
- ☐ Explore opportunities for continued collaboration or leadership

# WORKSHEET 10: Strategy Worksheet

***Referenced in [Step 7. Taking Action](#).***

| | | |
|---|---|---|
| **STRATEGY** | *Example: ECO Group members call their city council representatives* | |
| **RESOURCES NEEDED** | *Example:*<br>• *Telephones*<br>• *Contact list*<br>• *Script*<br>• *Tracking sheet* | |
| **LEVEL OF EFFORT (LOW, MEDIUM, HIGH)** | *Example: Medium* | |
| **ADVANTAGES** | *Example:*<br>• *Direct contact with decision-makers*<br>• *Can be done from home or together as a group activity*<br>• *Free/low cost* | |
| **DISADVANTAGES OR CHALLENGES** | *Example:*<br>• *Some people are uncomfortable making cold calls*<br>• *Language barriers*<br>• *Hostile/opposed representatives*<br>• *Unable to reach representatives* | |

# WORKSHEET 11: Action Tracking Worksheet

***Referenced in Step 7. Taking Action.***

| | | |
|---|---|---|
| **Goal:** | *Example: Get the city to hire two bilingual outreach workers to connect older adults with resources* | |
| **Strategy:** | *Example: ECO Group members reach out to their representatives.* | |
| **ACTION** | *Example: Call ECO Group members to remind them to come to the city council meeting* | |
| **WHO WILL DO IT?** | *Example: Steve* | |
| **WHEN IS IT DUE?** | *Example: Friday, June 13* | |
| **RESOURCES NEEDED** | *Example:*<br>• *Telephone*<br>• *Member contact list*<br>• *Script* | |
| **MEASURES OF PROGRESS** | *Example: Spoke with 18 members. Left 10 voicemails. Still need to call 8 people.* | |
| **STATUS** (NOT STARTED, IN PROGRESS, COMPLETE) | *Example: In progress* | |
| **WHO NEEDS TO KNOW THE STATUS?** | *Example: ECO Group organizer* | |
| **HAVE THEY BEEN NOTIFIED?** | *Example: No* | |

# WORKSHEET 12: Evaluation & Progress Tracking Worksheet

***Referenced in [Step 8. Evaluating & Communication Progress](#).***

Use this worksheet to reflect on progress, document learning, and support clear communication.

| **Goals & Actions Being Evaluated** | | | |
|---|---|---|---|
| **Goal:** | | | |
| **Related Strategy or Action:** | | | |
| **Time Period** *(last month, last quarter, specific dates):* | | | |
| **What Does Success Look Like?** | | | |
| | | | |
| **Measures of Progress** | | | |
| **Measure Type** | **What are you tracking?** | **How will you track it?** | **What happened?** |
| Quantitative (numbers) | | | |
| Qualitative (stories, feedback) | | | |
| **Reflection & Learning** | | | |
| **What is working well?** (What should you keep doing or build on?) | | | |
| | | | |
| **What is not working or needs adjustment?** (What can you do better?) | | | |
| | | | |

| **Equity & Inclusion Check** |
|---|
| **Whose voices are reflected in this progress?** (Who is participating or benefiting?) |
| |
| **Who may be missing, & why?** (Are there barriers or gaps to address?) |
| |
| **Next Steps** |
| **Based on what you've learned, what will you do next?** |
| |

| **Communicating Progress** | |
|---|---|
| **Who needs to know about this progress?** | |
| ☐ | ECO Group members |
| ☐ | Community partners |
| ☐ | Funders or supporters |
| ☐ | Decision-makers |
| ☐ | Broader community/public |
| **How will you share updates?** (e.g., meeting update, email, flyer, story, presentation) | |
| | |
| **Key message to share:** (One or two sentences that summarize progress clearly.) | |
| | |

# WORKSHEET 13: Communications Planning Worksheet

***Referenced in [Step 8. Evaluating & Communication Progress](#).***

Use this worksheet to help think through your strategy for communicating with people and organizations outside your ECO Group. The more specific you can get with your audiences, messages, and tactics, the more effective and efficient you will be.

| |
|---|
| **Goals** (Why do you want to communicate? What will it help you achieve?) |
| |
| **Audiences** (Who are you trying to reach? Examples include the media, politicians, corporate leaders, voters) |
| |
| **Messages** (What is the key thing you want people to know or do? Messages should be specific to each audience and based on what they care about.) |
| |
| **Tactics** (How will you reach your audience? Examples include email, phone calls, advertisements, social media.) |
| |

| **Messengers** (Who is the best person or organization to share the message with your audience?) |
| --- |
| |
| **Action Plan** (see Step 7: Taking Action for guidance) |
| |

# WORKSHEET 14: Resource Needs & Assets Worksheet

***Referenced in Step 9. Sustainability.***

| Resource Need | Group Assets | Community Assets | External/Paid Resources | Potential Funding Sources |
|---|---|---|---|---|
| *Example:*<br>• *Space for group meetings* | *Example:*<br>• *Member's home or business* | *Example:*<br>• *Library*<br>• *Community center*<br>• *School* | *Example:*<br>• *Hotel*<br>• *Restaurant*<br>• *Convention Center* | *Example:*<br>• *Local business*<br>• *Foundation grant*<br>• *Government grant* |
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