

# AUBI Pilot Design Template

*Adaptive Universal Basic Income Implementation Guide*

**Version:** 1.0 (2025-06-04)

**Purpose:** Enable elder communities to design and implement AUBI pilot programs

**Completion Time:** 4-6 weeks for comprehensive pilot design

**Format:** Elder-led community planning process with implementation framework

## Section 1: Community Context and Needs Assessment

### 1.1 Community Profile and Demographics

**Community Name:** \_\_\_\_\_ **Geographic Area:** \_\_\_\_\_ **Implementation Date:** \_\_\_\_\_ **Pilot Duration:** \_\_\_\_\_ (recommended: 24-36 months)

#### Elder Population Characteristics

**Total Elder Population (55+):** \_\_\_\_\_ **Age Distribution:**

- 55-64 years: \_\_\_\_ (%\_\_\_\_)
- 65-74 years: \_\_\_\_ (%\_\_\_\_)
- 75-84 years: \_\_\_\_ (%\_\_\_\_)
- 85+ years: \_\_\_\_ (%\_\_\_\_)

#### Cultural and Linguistic Diversity:

- Primary languages spoken: \_\_\_\_\_
- Cultural/ethnic communities represented: \_\_\_\_\_
- Indigenous populations: \_\_\_\_\_
- Immigrant/refugee populations: \_\_\_\_\_

#### Economic Circumstances:

- Elders with adequate retirement income: \_\_\_\_ (%\_\_\_\_)
- Elders facing economic insecurity: \_\_\_\_ (%\_\_\_\_)
- Elders currently working (paid): \_\_\_\_ (%\_\_\_\_)
- Elders providing unpaid care/volunteer work: \_\_\_\_ (%\_\_\_\_)

### Community Assets and Resources

#### Physical Infrastructure:

- ☐ Accessible meeting spaces available
- ☐ Community centers or gathering places
- ☐ Public transportation accessible to elders
- ☐ Healthcare facilities within reasonable distance
- ☐ Technology access (computers, internet)

#### Social Infrastructure:

- ☐ Existing elder organizations or groups
- ☐ Intergenerational programs or activities
- ☐ Faith communities active in elder support
- ☐ Volunteer networks and mutual aid systems

- ☐ Cultural organizations serving elder communities

### **Economic Infrastructure:**

- ☐ Local businesses interested in elder engagement
- ☐ Financial institutions familiar with elder needs
- ☐ Cooperative businesses or community enterprises
- ☐ Tourism or cultural economy involving elders
- ☐ Innovation or entrepreneurship opportunities

## **1.2 Identified Community Needs and Challenges**

### **Economic Security Challenges**

#### **Primary Economic Concerns** (check all that apply):

- ☐ Inadequate retirement income
- ☐ Rising healthcare costs
- ☐ Housing affordability and accessibility
- ☐ Transportation costs and access
- ☐ Food security issues
- ☐ Utility costs (heating, cooling, electricity)
- ☐ Technology access and digital divide
- ☐ Emergency expense vulnerability

#### **Current Income Sources for Community Elders:**

- Social Security/government pensions: \$\_\_\_\_\_ average monthly
- Private pensions/retirement accounts: \$\_\_\_\_\_ average monthly
- Part-time or consulting work: \$\_\_\_\_\_ average monthly
- Family financial support: \$\_\_\_\_\_ average monthly
- Other sources: \$\_\_\_\_\_ average monthly

**Estimated Monthly Income Gap:** \$\_\_\_\_\_ (difference between current income and dignified living costs)

### **Social and Community Challenges**

#### **Social Connection Issues** (check all that apply):

- ☐ Elder isolation and loneliness
- ☐ Limited intergenerational interaction
- ☐ Language barriers affecting elder participation
- ☐ Transportation barriers to community participation
- ☐ Age discrimination in community activities
- ☐ Limited elder leadership opportunities
- ☐ Inadequate recognition of elder contributions
- ☐ Family caregiving stress and burden

#### **Health and Wellbeing Concerns** (check all that apply):

- ☐ Inadequate healthcare access
- ☐ Mental health support gaps

- ☐ Medication affordability issues
- ☐ Home safety and accessibility problems
- ☐ Nutrition and food access challenges
- ☐ Physical activity and wellness opportunities
- ☐ Cognitive health support needs
- ☐ End-of-life care and planning support

### 1.3 Elder Contribution Documentation

#### Current Elder Contributions (Often Unrecognized)

##### Caregiving Contributions:

- Elders providing childcare: \_\_\_\_ hours/week average
- Elders caring for spouses/partners: \_\_\_\_ hours/week average
- Elders supporting adult children: \_\_\_\_ hours/week average
- Elders caring for other elders: \_\_\_\_ hours/week average

##### Community Contributions:

- Volunteer work in organizations: \_\_\_\_ hours/week average
- Informal community support (neighbors, friends): \_\_\_\_ hours/week average
- Religious/spiritual community service: \_\_\_\_ hours/week average
- Cultural preservation activities: \_\_\_\_ hours/week average

##### Knowledge and Wisdom Sharing:

- Formal mentoring or teaching: \_\_\_\_ hours/week average
- Informal guidance and advice: \_\_\_\_ hours/week average
- Cultural/traditional knowledge transmission: \_\_\_\_ hours/week average
- Professional consultation or advice: \_\_\_\_ hours/week average

##### Environmental and Community Development:

- Environmental stewardship (gardening, conservation): \_\_\_\_ hours/week average
- Community organizing or advocacy: \_\_\_\_ hours/week average
- Local economic participation (shopping, small business): \$\_\_\_\_ monthly average
- Innovation or problem-solving activities: \_\_\_\_ hours/week average

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## Section 2: AUBI Model Design

### 2.1 Base Security Layer Design

#### Minimum Income Floor Calculation

##### Local Cost of Living Analysis:

- Average monthly housing cost (1-bedroom accessible): \$\_\_\_\_\_
- Average monthly food cost for elder: \$\_\_\_\_\_
- Average monthly healthcare costs: \$\_\_\_\_\_
- Average monthly transportation costs: \$\_\_\_\_\_
- Average monthly utilities: \$\_\_\_\_\_
- Average monthly personal care and household items: \$\_\_\_\_\_

- Average monthly communication (phone, internet): \$\_\_\_\_\_
- Average monthly clothing and personal expenses: \$\_\_\_\_\_
- Emergency fund allocation (5% of income): \$\_\_\_\_\_

**Total Monthly Dignified Living Cost:** \$\_\_\_\_\_

**Proposed AUBI Base Security Payment:** \$\_\_\_\_\_ (Recommend: 75-100% of dignified living cost, accounting for other income sources)

### Payment Structure Options

#### Option A: Universal Base Payment

- Same base amount for all pilot participants
- Amount: \$\_\_\_\_\_ per month
- Justification: \_\_\_\_\_

#### Option B: Graduated Base Payment

- Different amounts based on current income levels
- Tier 1 (lowest current income): \$\_\_\_\_\_ per month
- Tier 2 (moderate current income): \$\_\_\_\_\_ per month
- Tier 3 (higher current income): \$\_\_\_\_\_ per month
- Justification: \_\_\_\_\_

#### Option C: Needs-Based Base Payment

- Amounts adjusted for individual circumstances
- Base amount: \$\_\_\_\_\_ per month
- Health-related adjustments: +\$\_\_\_\_\_ if applicable
- Housing-related adjustments: +\$\_\_\_\_\_ if applicable
- Care-giving adjustments: +\$\_\_\_\_\_ if applicable
- Justification: \_\_\_\_\_

**Selected Option:** \_\_\_\_\_ **Monthly Base Amount:** \$\_\_\_\_\_

## 2.2 Contribution Recognition Layer Design

### Contribution Categories and Recognition Rates

#### Caregiving Contributions:

- Family childcare: \$\_\_\_\_\_ per hour (max \_\_\_\_\_ hours/month)
- Elder care (spouse/partner): \$\_\_\_\_\_ per hour (max \_\_\_\_\_ hours/month)
- Community elder care: \$\_\_\_\_\_ per hour (max \_\_\_\_\_ hours/month)
- Adult child support: \$\_\_\_\_\_ per hour (max \_\_\_\_\_ hours/month)

#### Community Service Contributions:

- Volunteer organization work: \$\_\_\_\_\_ per hour (max \_\_\_\_\_ hours/month)
- Community organizing/advocacy: \$\_\_\_\_\_ per hour (max \_\_\_\_\_ hours/month)
- Religious/spiritual service: \$\_\_\_\_\_ per hour (max \_\_\_\_\_ hours/month)
- Cultural preservation activities: \$\_\_\_\_\_ per hour (max \_\_\_\_\_ hours/month)

#### Knowledge and Mentorship Contributions:

- Formal teaching or training: \$\_\_\_\_\_ per hour (max \_\_\_\_\_ hours/month)
- Professional mentoring: \$\_\_\_\_\_ per hour (max \_\_\_\_\_ hours/month)

- Cultural knowledge transmission: \$\_\_\_\_\_ per hour (max \_\_\_\_ hours/month)
- Innovation and problem-solving: \$\_\_\_\_\_ per hour (max \_\_\_\_ hours/month)

#### **Environmental and Development Contributions:**

- Environmental stewardship: \$\_\_\_\_\_ per hour (max \_\_\_\_ hours/month)
- Community development projects: \$\_\_\_\_\_ per hour (max \_\_\_\_ hours/month)
- Local economic development: \$\_\_\_\_\_ per project/month
- Climate adaptation activities: \$\_\_\_\_\_ per hour (max \_\_\_\_ hours/month)

### **Contribution Documentation System**

#### **Documentation Method Selection** (choose one or combination):

- ☐ **Self-reporting with community verification:** Elders document own contributions with peer review
- ☐ **Blockchain-based ledger:** Digital system tracking contributions with privacy protection
- ☐ **Community witness system:** Contributions verified by community members who benefit
- ☐ **Professional verification:** Social workers or community coordinators verify contributions
- ☐ **Family/caregiver verification:** Family members or care recipients verify contributions

#### **Documentation Requirements:**

- Frequency of reporting: \_\_\_\_\_ (weekly/monthly/quarterly)
- Required documentation: \_\_\_\_\_ (time logs, witness statements, photos, etc.)
- Verification process: \_\_\_\_\_
- Appeals process: \_\_\_\_\_

#### **Privacy and Dignity Protections:**

- ☐ Elder control over what contributions are documented
- ☐ Right to privacy about family circumstances
- ☐ Protection from surveillance or invasive monitoring
- ☐ Community ownership of contribution data
- ☐ Elder authority to modify or delete contribution records

## **2.3 Adaptive Needs Layer Design**

### **Health and Care-Related Adjustments**

#### **Health Status Adjustments:**

- New chronic illness diagnosis: +\$\_\_\_\_\_ per month for \_\_\_\_ months
- Hospitalization or major health event: +\$\_\_\_\_\_ per month for \_\_\_\_ months
- Disability accommodation needs: +\$\_\_\_\_\_ per month ongoing
- Mental health support needs: +\$\_\_\_\_\_ per month as needed

#### **Care Requirement Adjustments:**

- Need for home care services: +\$\_\_\_\_\_ per month
- Need for transportation assistance: +\$\_\_\_\_\_ per month
- Need for technology support: +\$\_\_\_\_\_ per month
- Need for accessibility modifications: +\$\_\_\_\_\_ one-time payment

#### **Life Transition Adjustments:**

- Loss of spouse or life partner: +\$\_\_\_\_\_ per month for \_\_\_\_ months
- Housing transition needs: +\$\_\_\_\_\_ per month for \_\_\_\_ months
- Family crisis affecting elder: +\$\_\_\_\_\_ per month as needed
- End-of-life preparation and support: +\$\_\_\_\_\_ as needed

### Adjustment Determination Process

**Assessment Method** (choose one):

- ☐ **Elder self-assessment with community support:** Elders identify their own needs with peer assistance
- ☐ **Community care team evaluation:** Elder-led team assesses adjustment needs
- ☐ **Healthcare provider consultation:** Medical professionals provide input on health-related needs
- ☐ **Family conference process:** Elder, family, and community representatives develop adjustment plan
- ☐ **Peer advocate system:** Other elders advocate for adjustment needs

**Decision-Making Authority:** Who has final authority over adjustment decisions? \_\_\_\_\_

**Appeals Process:** How can elders appeal adjustment decisions? \_\_\_\_\_

## 2.4 Innovation Participation Layer Design

### Innovation and Leadership Opportunities

**Community Problem-Solving:**

- Participating in community innovation challenges: \$\_\_\_\_\_ per project
- Leading problem-solving teams: \$\_\_\_\_\_ per month
- Developing solutions to community challenges: \$\_\_\_\_\_ per innovation
- Testing and providing feedback on innovations: \$\_\_\_\_\_ per project

**Leadership and Governance:**

- Serving on elder cooperative governing council: \$\_\_\_\_\_ per month
- Leading community meetings or forums: \$\_\_\_\_\_ per meeting
- Participating in participatory budgeting: \$\_\_\_\_\_ per budget cycle
- Representing community in external meetings: \$\_\_\_\_\_ per representation

**Knowledge Creation and Preservation:**

- Documenting cultural or professional knowledge: \$\_\_\_\_\_ per documentation project
- Creating educational materials or programs: \$\_\_\_\_\_ per project
- Participating in research or evaluation: \$\_\_\_\_\_ per participation
- Developing community resource guides: \$\_\_\_\_\_ per guide

**Innovation Hub Participation:**

- Regular participation in innovation activities: \$\_\_\_\_\_ per month
- Mentoring other elder innovators: \$\_\_\_\_\_ per mentorship relationship
- Developing prototypes or products: \$\_\_\_\_\_ per development project
- Creating intellectual property for community benefit: \$\_\_\_\_\_ per creation

### Innovation Support and Recognition

**Innovation Support Provided:**

- ☐ Access to workshop space and tools
- ☐ Technology and equipment for innovation
- ☐ Business development and legal support
- ☐ Mentorship from experienced innovators
- ☐ Funding for prototype development
- ☐ Community testing and feedback opportunities

#### Intellectual Property Arrangements:

- ☐ Elders retain full ownership of innovations
- ☐ Community receives shared benefit from commercially successful innovations
- ☐ Open source sharing of innovations for community benefit
- ☐ Patent protection assistance for elder innovators

## Section 3: Pilot Implementation Framework

### 3.1 Participant Selection and Enrollment

#### Target Participant Population

**Total Pilot Participants:** \_\_\_\_\_ elders **Selection Criteria** (check all that apply):

- ☐ Age 55+ and residing in pilot community area
- ☐ Commitment to participate for full pilot duration
- ☐ Willingness to engage in contribution documentation
- ☐ Agreement to participate in evaluation and feedback
- ☐ Representative diversity across community demographics

#### Diversity and Inclusion Targets:

- Cultural/ethnic diversity: \_\_\_\_% of major community groups represented
- Economic diversity: \_\_\_\_% from different income levels
- Age diversity: \_\_\_\_% from each age decade (55-64, 65-74, 75-84, 85+)
- Ability diversity: \_\_\_\_% including elders with disabilities
- Gender diversity: \_\_\_\_% reflecting community gender distribution

#### Recruitment Strategy:

- ☐ Community forums and information sessions
- ☐ Outreach through existing elder organizations
- ☐ Door-to-door community organizing
- ☐ Family and social network recruitment
- ☐ Partnership with healthcare and social service providers
- ☐ Multilingual outreach and materials

#### Enrollment Process Design

##### Application Process:

1. **Information Session Attendance:** Required community education about AUBI principles and pilot structure
2. **Application Completion:** Basic information and commitment verification

3. **Community Integration Meeting:** Opportunity for community members to meet and discuss participation

4. **Enrollment Confirmation:** Final enrollment with start date and initial payment calculation

**Informed Consent Components:**

- ☐ Understanding of pilot nature and experimental status
- ☐ Agreement to contribution documentation and evaluation participation
- ☐ Privacy protections and data control explanations
- ☐ Right to withdraw from pilot at any time
- ☐ Community decision-making participation expectations

**Waitlist Management:**

- Process for handling more applications than pilot capacity: \_\_\_\_\_
- Criteria for waitlist priority: \_\_\_\_\_
- Communication plan for waitlist participants: \_\_\_\_\_

### 3.2 Payment and Distribution System

#### Payment Distribution Method

**Payment Frequency:**

- ☐ Weekly payments
- ☐ Bi-weekly payments
- ☐ Monthly payments
- ☐ Quarterly payments with monthly advances

**Distribution Method Selection** (choose primary method):

- ☐ **Direct bank deposit:** Electronic transfer to participant bank accounts
- ☐ **Prepaid debit cards:** Cards loaded with AUBI payments each period
- ☐ **Cash payments:** In-person cash distribution with receipt system
- ☐ **Community credit union:** Payments through local financial cooperative
- ☐ **Mobile payment system:** Smartphone-based payment distribution

**Banking and Financial Access Support:**

- ☐ Assistance opening bank accounts for unbanked participants
- ☐ Financial literacy education and support
- ☐ Protection from predatory lending and financial exploitation
- ☐ Support for participants without identification or documentation
- ☐ Advocacy with financial institutions for elder-friendly services

#### Payment Calculation and Communication

**Monthly Payment Calculation Example:**

- Base Security Layer: \$\_\_\_\_\_
- Contribution Recognition Layer: \$\_\_\_\_\_
- Adaptive Needs Layer: \$\_\_\_\_\_
- Innovation Participation Layer: \$\_\_\_\_\_
- **Total Monthly Payment:** \$\_\_\_\_\_



**Payment Communication System:**

- How participants receive payment information: \_\_\_\_\_
- Timeline for payment calculation and notification: \_\_\_\_\_
- Process for payment questions or disputes: \_\_\_\_\_
- Language accessibility for payment information: \_\_\_\_\_

**Emergency Payment Procedures:**

- Process for emergency payment advances: \_\_\_\_\_
- Criteria for emergency payment eligibility: \_\_\_\_\_
- Timeline for emergency payment distribution: \_\_\_\_\_

**3.3 Governance and Democratic Participation****Elder Cooperative Governance Structure****Governance Body Composition:**

- Total governing council members: \_\_\_\_\_
- Selection method: \_\_\_\_\_ (election, rotation, consensus selection)
- Term length: \_\_\_\_\_ months
- Representation requirements: \_\_\_\_\_ (geographic, demographic, etc.)

**Decision-Making Processes:**

- **Payment Level Decisions:** How are base payment amounts and contribution rates determined?
- **Contribution Recognition:** How are new contribution categories added or modified?
- **Adaptive Needs:** How are adjustment criteria and amounts determined?
- **Conflict Resolution:** How are disputes about payments or participation resolved?
- **Policy Modifications:** How can pilot policies be changed based on community feedback?

**Community Meetings and Participation:**

- Regular community meeting frequency: \_\_\_\_\_
- Meeting accessibility (language, mobility, technology): \_\_\_\_\_
- Decision-making quorum requirements: \_\_\_\_\_
- Voting procedures and consensus-building approaches: \_\_\_\_\_

**Participatory Budgeting Integration****Community Resource Control:**

- Percentage of pilot budget controlled by participant community: \_\_\_\_\_%
- Decision-making process for budget allocation: \_\_\_\_\_
- Community priorities for resource allocation: \_\_\_\_\_

**Budget Categories for Community Control:**

- ☐ Innovation and community development projects
- ☐ Community gathering and meeting expenses
- ☐ Elder education and skill development programs
- ☐ Accessibility improvements and transportation
- ☐ Community care and mutual aid initiatives
- ☐ Cultural programming and celebration

### 3.4 Technology and Innovation Integration

#### Technology Platform Design

##### Elder-Accessible Technology Requirements:

- ☐ **Large, clear interfaces** with adjustable text and contrast
- ☐ **Voice interaction capabilities** for verbal contribution reporting
- ☐ **Multi-modal access** including phone, web, and in-person options
- ☐ **Cognitive adaptation** adjusting complexity based on user preferences
- ☐ **Privacy by design** with elder control over data sharing

##### Technology Support Services:

- ☐ One-on-one technology training and support
- ☐ Peer elder technology mentorship programs
- ☐ Family member training for technology assistance
- ☐ Community technology centers with elder-friendly equipment
- ☐ Technical support hotline with elder-trained staff

##### Digital Divide Bridging:

- ☐ Device provision (tablets, smartphones) for participants needing technology access
- ☐ Internet access subsidies or community wifi
- ☐ Alternative non-digital participation options for all technology functions
- ☐ Technology choice and opt-out protections

#### Innovation Hub Integration

##### Innovation Opportunities for Participants:

- ☐ Community problem-solving challenges and competitions
- ☐ Product development addressing aging-related needs
- ☐ Service innovation for elder community support
- ☐ Technology testing and feedback programs
- ☐ Business development and entrepreneurship support

##### Innovation Support Infrastructure:

- ☐ Workshop space with accessible tools and equipment
- ☐ Technology lab with elder-friendly computers and software
- ☐ Business development mentorship and legal support
- ☐ Prototype funding and development assistance
- ☐ Market testing and customer feedback opportunities

##### Intellectual Property Protection:

- ☐ Legal assistance for patent and copyright protection
- ☐ Community benefit sharing agreements for successful innovations
- ☐ Open source sharing options for community-focused innovations
- ☐ Elder ownership and control of innovation intellectual property

## Section 4: Monitoring, Evaluation, and Evidence Building

### 4.1 Elder Wellbeing Index Implementation

#### Purpose Score Measurement

##### Meaningful Activity Tracking:

- Weekly hours in valued activities (work, volunteer, care, creative): \_\_\_\_ hours average target
- Self-reported sense of impact and contribution: \_\_\_\_ scale (1-10)
- Progress toward personal goals and aspirations: \_\_\_\_ scale (1-10)
- Community recognition of elder expertise and contribution: \_\_\_\_ scale (1-10)

##### Purpose Score Data Collection Method:

- ☐ Monthly self-assessment surveys
- ☐ Quarterly in-depth interviews
- ☐ Community peer assessment
- ☐ Activity logging and documentation

#### Connection Index Measurement

##### Social Integration Assessment:

- Frequency of intergenerational contact: \_\_\_\_ interactions/week target
- Quality of family relationships: \_\_\_\_ scale (1-10)
- Community involvement and leadership: \_\_\_\_ activities/month target
- Peer support network strength: \_\_\_\_ relationships target

##### Connection Index Data Collection Method:

- ☐ Social network mapping exercises
- ☐ Relationship quality surveys
- ☐ Community participation tracking
- ☐ Loneliness and isolation measurement

#### Agency Measure Assessment

##### Autonomy and Control Evaluation:

- Decision-making control over daily life: \_\_\_\_ scale (1-10)
- Financial independence and security: \_\_\_\_ scale (1-10)
- Healthcare and care preference respect: \_\_\_\_ scale (1-10)
- Community and political participation: \_\_\_\_ scale (1-10)

##### Agency Measure Data Collection Method:

- ☐ Autonomy assessment questionnaires
- ☐ Decision-making authority evaluation
- ☐ Care preference satisfaction surveys
- ☐ Political engagement tracking

#### Wisdom Utilization Documentation

##### Knowledge Application Assessment:

- Community recognition of elder expertise: \_\_\_\_ scale (1-10)

- Mentorship and teaching opportunities: \_\_\_\_ relationships/month target
- Innovation and problem-solving contribution: \_\_\_\_ projects/year target
- Policy influence and community decision-making: \_\_\_\_ scale (1-10)

#### **Wisdom Utilization Data Collection Method:**

- ☐ Knowledge documentation projects
- ☐ Community impact assessment
- ☐ Innovation and teaching tracking
- ☐ Policy influence measurement

## **4.2 Economic Impact Assessment**

### **Individual Economic Outcomes**

#### **Financial Security Measurement:**

- Total monthly income (AUBI + other sources): \$\_\_\_\_ target
- Housing cost burden (% of income): \_\_\_\_% target ( $\leq 30\%$ )
- Food security assessment: \_\_\_\_ scale (1-10)
- Healthcare affordability: \_\_\_\_ scale (1-10)
- Emergency financial resilience: \_\_\_\_ months expenses saved target

#### **Economic Empowerment Tracking:**

- Small business creation or expansion: \_\_\_\_ participants target
- Innovation project development: \_\_\_\_ projects target
- Professional consultation or paid mentoring: \_\_\_\_ participants target
- Cooperative or community enterprise participation: \_\_\_\_ participants target

### **Community Economic Impact**

#### **Local Economic Activity:**

- Elder spending in local businesses: \$\_\_\_\_ monthly increase target
- Local business creation or expansion supported by elder participation: \_\_\_\_ businesses target
- Tourism or cultural economy enhancement: \$\_\_\_\_ annual increase target
- Property value impacts: \_\_\_\_% change target

#### **Economic Multiplier Effects:**

- Direct AUBI payments: \$\_\_\_\_ total monthly
- Estimated local economic impact (multiplier effect): \$\_\_\_\_ monthly
- Healthcare cost reduction: \$\_\_\_\_ annual savings
- Family financial support reduction: \$\_\_\_\_ monthly community savings

## **4.3 Social and Community Impact Assessment**

### **Ageism and Discrimination Measurement**

#### **Community Attitude Assessment:**

- Pre/post community surveys on aging attitudes: \_\_\_\_ point improvement target
- Age discrimination incident reporting: \_\_\_\_ incidents/month baseline vs. pilot
- Elder workplace participation: \_\_\_\_% increase target
- Elder community leadership representation: \_\_\_\_% increase target

## Intergenerational Relationship Quality

### Cross-Age Relationship Measurement:

- Intergenerational programming participation: \_\_\_\_ participants target
- Family relationship quality: \_\_\_\_ scale (1-10) improvement target
- Community conflict reduction: \_\_\_\_% decrease target
- Mutual support between age groups: \_\_\_\_ scale (1-10) improvement target

### Community Cohesion Assessment:

- Community meeting attendance: \_\_\_\_% participation target
- Mutual aid and support network strength: \_\_\_\_ scale (1-10)
- Community crisis response capacity: \_\_\_\_ scale (1-10)
- Cultural preservation and transmission: \_\_\_\_ projects/year target

## 4.4 Health and Healthcare Impact Assessment

### Physical and Mental Health Outcomes

#### Health Status Tracking:

- Self-reported physical health: \_\_\_\_ scale (1-10)
- Mental health and depression screening: \_\_\_\_ standardized assessment
- Chronic disease management: \_\_\_\_ scale (1-10)
- Healthcare access and satisfaction: \_\_\_\_ scale (1-10)

#### Healthcare Utilization Changes:

- Emergency room visits: \_\_\_\_% change target
- Hospitalization rates: \_\_\_\_% change target
- Preventive care utilization: \_\_\_\_% increase target
- Mental health service use: \_\_\_\_% appropriate increase target

### Healthcare Cost Impact

#### Direct Healthcare Savings:

- Emergency intervention cost reduction: \$\_\_\_\_ annual savings target
- Chronic disease management improvement: \$\_\_\_\_ annual savings target
- Mental health treatment cost changes: \$\_\_\_\_ annual impact
- Preventive care investment: \$\_\_\_\_ annual increase

## 4.5 Research Design and Methodology

### Study Design Framework

#### Research Approach Selection (choose one):

- ☐ **Randomized Controlled Trial:** Random assignment to AUBI vs. control group
- ☐ **Matched Comparison Communities:** AUBI pilot vs. similar community without AUBI
- ☐ **Pre/Post Comparison:** Pilot community before and after AUBI implementation
- ☐ **Mixed Methods Case Study:** Comprehensive documentation and analysis of pilot experience

**Baseline Data Collection:** Timeline for pre-implementation data collection: \_\_\_\_\_ Baseline measurements for all outcome indicators: \_\_\_\_\_ Control group or comparison community data collection: \_\_\_\_\_

### Data Collection and Privacy Protection

#### Elder Data Sovereignty Protections:

- ☐ Elder community control over research data
- ☐ Granular consent for different types of data sharing
- ☐ Community authority over research publication and dissemination
- ☐ Elder participant authority to withdraw data at any time
- ☐ Community benefit requirements for all research using pilot data

#### Research Ethics Approval:

- ☐ Elder community review and approval of research protocols
- ☐ University Institutional Review Board approval if partnering with academic institutions
- ☐ Community-controlled research ethics oversight
- ☐ Regular review and modification of research approaches based on community feedback

#### Data Security and Privacy:

- ☐ Advanced encryption for all personal data
- ☐ Community-controlled data storage and access
- ☐ Anonymous reporting options for sensitive information
- ☐ Regular security audits and privacy protection updates

## Section 5: Funding and Resource Mobilization

### 5.1 Pilot Budget Development

#### Total Pilot Budget Calculation

##### Direct AUBI Payments:

- Number of participants: \_\_\_\_\_
- Average monthly payment per participant: \$\_\_\_\_\_
- Total monthly AUBI payments: \$\_\_\_\_\_
- Total AUBI payments for pilot duration: \$\_\_\_\_\_

##### Administration and Support Costs:

- Payment distribution system costs: \$\_\_\_\_\_ (\_\_\_\_% of total)
- Technology platform development and maintenance: \$\_\_\_\_\_ (\_\_\_\_% of total)
- Community organizing and governance support: \$\_\_\_\_\_ (\_\_\_\_% of total)
- Elder education and training programs: \$\_\_\_\_\_ (\_\_\_\_% of total)
- Research and evaluation costs: \$\_\_\_\_\_ (\_\_\_\_% of total)
- Legal and professional services: \$\_\_\_\_\_ (\_\_\_\_% of total)
- Community space and meeting costs: \$\_\_\_\_\_ (\_\_\_\_% of total)
- Innovation hub equipment and support: \$\_\_\_\_\_ (\_\_\_\_% of total)

**Total Pilot Budget:** \$\_\_\_\_\_

**Cost Per Participant:** \$\_\_\_\_\_ for full pilot duration **Monthly Cost Per Participant:** \$\_\_\_\_\_ (including AUBI payment and support costs)

### Budget Allocation Priorities

**Funding Priority Ranking** (rank 1-8):

- \_\_\_\_\_ Direct AUBI payments to participants
- \_\_\_\_\_ Technology platform and digital inclusion support
- \_\_\_\_\_ Community organizing and democratic governance
- \_\_\_\_\_ Innovation hub development and equipment
- \_\_\_\_\_ Research and evaluation activities
- \_\_\_\_\_ Elder education and skill development
- \_\_\_\_\_ Community space and accessibility improvements
- \_\_\_\_\_ Legal and professional service support

## 5.2 Funding Sources and Strategy

### Primary Funding Sources

**Government Funding Opportunities:**

- ☐ Municipal/local government community development funds
- ☐ State/provincial aging or social service grants
- ☐ Federal research and pilot program funding
- ☐ Healthcare or public health innovation grants

**Foundation and Philanthropic Support:**

- ☐ Private foundations focusing on aging, economic justice, or community development
- ☐ Community foundations with local focus
- ☐ Corporate foundation support
- ☐ Individual major donor cultivation

**Community and Grassroots Funding:**

- ☐ Crowdfunding campaign for community support
- ☐ Local business sponsorship and partnership
- ☐ Elder community self-funding through savings and contributions
- ☐ Faith community and cultural organization support

**Innovation and Investment Funding:**

- ☐ Social impact investment opportunities
- ☐ Aging impact bonds or outcomes-based financing
- ☐ Technology development grants
- ☐ Academic research partnership funding

### Funding Strategy Development

**Primary Funding Target:** \$\_\_\_\_\_ from \_\_\_\_\_ source **Secondary Funding Targets:** \$\_\_\_\_\_ from \_\_\_\_\_ sources **Community Contribution Target:** \$\_\_\_\_\_ from local elder and community contributions **In-Kind Support Target:** \$\_\_\_\_\_ value from volunteer time and donated resources

**Funding Timeline:**

- Funding campaign launch: \_\_\_\_\_
- Primary funding secured by: \_\_\_\_\_
- Full funding secured by: \_\_\_\_\_
- Pilot implementation start: \_\_\_\_\_

**5.3 Sustainability and Long-Term Funding****Economic Model for Sustainability****Cost Reduction Through Pilot:**

- Healthcare cost savings: \$\_\_\_\_\_ annually
- Emergency service cost reduction: \$\_\_\_\_\_ annually
- Family support cost reduction: \$\_\_\_\_\_ annually
- Elder innovation economic returns: \$\_\_\_\_\_ annually

**Revenue Generation Through Pilot:**

- Elder business creation and tax revenue: \$\_\_\_\_\_ annually
- Innovation intellectual property revenue: \$\_\_\_\_\_ annually
- Tourism and cultural economy enhancement: \$\_\_\_\_\_ annually
- Local economic multiplier effects: \$\_\_\_\_\_ annually

**Net Economic Impact:** \$\_\_\_\_\_ annually (revenues and savings minus costs)

**Long-Term Funding Development****Political Advocacy for Ongoing Funding:**

- ☐ Municipal budget allocation for AUBI program
- ☐ State/provincial policy development for AUBI support
- ☐ Federal policy advocacy for AUBI pilot scaling
- ☐ Integration with existing pension and social security systems

**Economic Sustainability Mechanisms:**

- ☐ Community investment fund development
- ☐ Social enterprise and cooperative business development
- ☐ Innovation revenue sharing agreements
- ☐ Community-controlled funding mechanisms

**Replication and Scaling Strategy:**

- ☐ Documentation of pilot success for replication
- ☐ Training and support for other communities implementing AUBI
- ☐ Regional network development for resource sharing
- ☐ National and international AUBI movement building



## Section 6: Implementation Timeline and Milestones

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### 6.1 Pre-Launch Phase (Months 1-6)

#### Months 1-2: Planning and Design Completion

##### Community Design Process:

- ☐ Complete AUBI model design with community input
- ☐ Finalize governance structure and decision-making processes
- ☐ Develop technology platform requirements and accessibility features
- ☐ Create community charter and participation agreements

##### Infrastructure Development:

- ☐ Secure community space for meetings and activities
- ☐ Establish technology access and support systems
- ☐ Develop payment distribution system
- ☐ Create contribution documentation and verification processes

#### Months 3-4: Funding and Legal Framework

##### Resource Mobilization:

- ☐ Secure primary funding sources
- ☐ Develop community contribution and support systems
- ☐ Establish legal framework for pilot operation
- ☐ Create insurance and liability protection

##### Community Preparation:

- ☐ Conduct community education sessions about AUBI principles
- ☐ Train elder leaders in governance and facilitation skills
- ☐ Develop conflict resolution and decision-making processes
- ☐ Build relationships with local businesses and organizations

#### Months 5-6: Participant Recruitment and System Testing

##### Recruitment and Enrollment:

- ☐ Launch community recruitment and education campaign
- ☐ Conduct application and enrollment process
- ☐ Verify participant eligibility and commitment
- ☐ Complete baseline data collection for evaluation

##### System Testing and Preparation:

- ☐ Test payment distribution system with small group
- ☐ Pilot contribution documentation and verification processes
- ☐ Train community facilitators and support staff
- ☐ Conduct final technology platform testing

### 6.2 Launch Phase (Months 7-9)

#### Month 7: Pilot Launch and Initial Payments

##### Program Launch:

- ☐ Community celebration and official pilot launch
- ☐ First AUBI payments distributed to all participants
- ☐ Begin contribution documentation and recognition
- ☐ Launch innovation hub activities and community programs

**Initial Support and Troubleshooting:**

- ☐ Daily check-ins with participants during first week
- ☐ Weekly community meetings for first month
- ☐ Technology support and assistance available daily
- ☐ Payment and documentation system troubleshooting

**Months 8-9: System Stabilization and Community Building****Program Operations Stabilization:**

- ☐ Monthly payment distribution becomes routine
- ☐ Contribution documentation system fully operational
- ☐ Community governance meetings established
- ☐ Innovation activities and projects launched

**Community Development:**

- ☐ Intergenerational programming development
- ☐ Elder leadership roles established and functioning
- ☐ Peer support networks strengthened
- ☐ Community problem-solving projects initiated

**6.3 Operation Phase (Months 10-30)****Months 10-18: Program Maturation and Development****Program Enhancement:**

- ☐ Quarterly program evaluation and community feedback
- ☐ Adaptive needs assessment and adjustment implementation
- ☐ Innovation project development and prototype creation
- ☐ Community leadership development and succession planning

**Research and Documentation:**

- ☐ Quarterly data collection for evaluation
- ☐ Community story documentation and sharing
- ☐ Best practice identification and documentation
- ☐ External research collaboration if desired by community

**Months 19-30: Sustainability and Replication Planning****Long-Term Sustainability Development:**

- ☐ Community economic self-sufficiency assessment
- ☐ Innovation revenue generation and intellectual property development
- ☐ Political advocacy for ongoing funding and policy support
- ☐ Community capacity for independent operation evaluation

**Knowledge Sharing and Replication:**

- ☐ Documentation of pilot lessons learned and best practices
- ☐ Training materials development for other communities
- ☐ Replication consultation and support for interested communities
- ☐ Regional and national AUBI network participation

**6.4 Evaluation and Transition Phase (Months 31-36)****Months 31-33: Comprehensive Evaluation****Impact Assessment:**

- ☐ Complete Elder Wellbeing Index assessment
- ☐ Economic impact evaluation and cost-benefit analysis
- ☐ Community transformation documentation
- ☐ Individual participant outcome assessment

**Research Analysis and Publication:**

- ☐ Data analysis and statistical evaluation
- ☐ Community-controlled research report development
- ☐ Academic publication preparation if desired by community
- ☐ Policy recommendation development

**Months 34-36: Transition Planning and Future Development****Program Continuation Planning:**

- ☐ Community decision-making about program continuation
- ☐ Funding and sustainability plan implementation
- ☐ Policy advocacy for permanent program establishment
- ☐ Community leadership transition and succession

**Legacy and Impact:**

- ☐ Community celebration of pilot achievements
- ☐ Story documentation and preservation
- ☐ Mentorship and support for other communities
- ☐ Movement building and advocacy for AUBI scaling

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**Section 7: Risk Management and Contingency Planning**

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**7.1 Financial and Administrative Risks****Funding Interruption or Shortfall**

**Risk:** Primary funding source withdraws support or provides less funding than anticipated

**Prevention Strategies:**

- Diversify funding sources with no single source representing more than 40% of budget
- Develop contingency funding relationships before pilot launch
- Build community reserve fund through local contributions
- Create graduated payment reduction protocol if needed

**Response Plan:**

- Immediate community meeting to discuss options and priorities
- Temporary payment reduction with community vote on distribution
- Emergency fundraising campaign with existing supporters
- Advocacy campaign with funders and political supporters

**Payment System Failure or Fraud**

**Risk:** Technology system failure, bank account problems, or fraudulent activity affecting payments

**Prevention Strategies:**

- Multiple backup payment distribution methods available
- Community oversight of financial management and payment systems
- Regular financial audits and transparency reporting
- Fraud prevention training for participants and staff

**Response Plan:**

- Emergency payment distribution through backup systems
- Immediate investigation and resolution of system problems
- Community communication about problems and resolution timeline
- Financial audit and system improvement implementation

**7.2 Community and Social Risks****Community Conflict or Division**

**Risk:** Disagreements about payment levels, contribution recognition, or program policies create community division

**Prevention Strategies:**

- Strong democratic decision-making processes and conflict resolution training
- Regular community feedback and adjustment mechanisms
- Diverse and inclusive leadership development
- Cultural competency and communication skill building

**Response Plan:**

- Mediation and facilitated community dialogue
- Temporary suspension of disputed policies while resolution is developed
- External mediation support if needed
- Community healing and relationship repair processes

**Elder Exploitation or Abuse**

**Risk:** Family members, service providers, or others exploit elder AUBI payments or participants

**Prevention Strategies:**

- Elder rights education and abuse prevention training
- Community peer support and monitoring systems
- Direct payment to elders only, with protections against coercion
- Reporting and intervention protocols for suspected abuse

**Response Plan:**

- Immediate intervention and protection for affected elders
- Law enforcement involvement if criminal activity suspected
- Community support and advocacy for affected participants
- Policy and procedure review and improvement

### 7.3 Political and Legal Risks

#### Political Opposition or Legal Challenge

**Risk:** Local political opposition or legal challenges to pilot implementation

**Prevention Strategies:**

- Legal review and compliance verification before pilot launch
- Political relationship building and coalition development
- Community education and public support building
- Documentation of pilot benefits and community support

**Response Plan:**

- Legal defense and advocacy campaign
- Community mobilization and political pressure
- Media campaign highlighting pilot benefits
- Negotiation and compromise with opponents when possible

#### Regulatory or Policy Changes

**Risk:** Changes in government regulations or policies affecting pilot operation or participant eligibility

**Prevention Strategies:**

- Regular monitoring of relevant policy developments
- Relationship building with government officials and agencies
- Advocacy for supportive policy development
- Legal framework development protecting pilot operations

**Response Plan:**

- Immediate legal and policy analysis of changes
- Advocacy campaign to prevent harmful policy implementation
- Program modification to comply with new requirements if necessary
- Community communication about changes and responses

### 7.4 Technology and Privacy Risks

#### Data Breach or Privacy Violation

**Risk:** Unauthorized access to participant personal information or contribution data

**Prevention Strategies:**

- Advanced encryption and security protocols for all data
- Community control over data access and sharing
- Regular security audits and system updates
- Privacy by design technology development

**Response Plan:**

- Immediate security breach containment and investigation
- Community notification and communication about breach and response
- Enhanced security implementation and system improvements
- Support for participants affected by privacy violations

### Technology System Failure

**Risk:** Technology platform failure affecting payment distribution, contribution tracking, or community communication

**Prevention Strategies:**

- Multiple backup systems and redundant technology infrastructure
- Non-digital alternatives for all technology functions
- Regular system maintenance and updates
- Community technology support and training

**Response Plan:**

- Immediate activation of backup systems and manual processes
- Community communication about problems and alternative procedures
- Rapid system repair or replacement with improved technology
- Evaluation and improvement of technology resilience

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## Section 8: Community Communication and Engagement

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### 8.1 Community Education and Outreach

#### AUBI Principles Education

**Core Concepts to Communicate:**

- AUBI as recognition of ongoing elder contributions, not charity or welfare
- Elder agency and leadership in designing and managing their own support systems
- Community strengthening through elder participation rather than strain
- Economic security enabling elder innovation and community contribution

**Educational Methods:**

- ☐ Community forums and town halls with elder leadership
- ☐ One-on-one conversations and home visits
- ☐ Cultural and social event integration
- ☐ Faith community and cultural organization partnerships
- ☐ Multilingual materials and interpretation services

**Key Messages for Different Audiences:**

- **For Elders:** "You deserve security and respect for your contributions"
- **For Families:** "AUBI strengthens families by reducing financial stress"
- **For Younger Generations:** "Investment in elder support creates systems that will benefit you"
- **For Business Community:** "Elder economic participation strengthens local economy"
- **For Political Leaders:** "AUBI reduces costs while improving elder wellbeing"

## Addressing Concerns and Opposition

### Common Concerns and Responses:

**"This creates dependency"** *Response:* AUBI recognizes and rewards ongoing elder contributions, creating economic systems that strengthen through elder participation

**"We can't afford this"** *Response:* AUBI generates economic returns through healthcare savings, innovation, and local economic activity that often exceed program costs

**"This is unfair to younger generations"** *Response:* AUBI creates aging support systems that will benefit everyone as they age, while elder wisdom and participation benefit communities now

**"Elders should rely on family support"** *Response:* AUBI strengthens families by reducing financial stress while enabling elders to contribute to rather than burden family resources

## 8.2 Media and Public Communication

### Media Strategy Development

#### Communication Goals:

- Build public understanding of AUBI principles and community benefits
- Counter ageist stereotypes and narratives about elder "burden"
- Highlight elder innovation, leadership, and community contributions
- Generate support for pilot implementation and potential scaling

#### Media Outlets and Relationships:

- Local newspapers and community publications
- Radio stations and podcasts focusing on community issues
- Social media platforms with elder community presence
- Community blogs and online forums
- Television news and documentary opportunities

#### Story Development and Messaging:

- Elder innovation and business creation stories
- Family relationship strengthening through AUBI
- Community economic development and local business impact
- Intergenerational cooperation and mutual learning
- Health and wellbeing improvements among participants

### Crisis Communication Planning

#### Potential Crisis Situations:

- Participant fraud or misuse of AUBI payments
- Technology system failures affecting payments
- Community conflicts about program policies
- Political opposition or legal challenges
- Negative media coverage or misinformation

#### Crisis Communication Protocols:

- Immediate community notification and transparency
- Clear, factual communication about problems and solutions
- Elder community leadership in crisis response



- External support and advocacy mobilization
- Learning and improvement from crisis experience

### 8.3 Community Feedback and Adaptation

#### Continuous Feedback Systems

##### Feedback Collection Methods:

- ☐ Monthly community meetings with structured feedback sessions
- ☐ Quarterly individual participant interviews
- ☐ Anonymous suggestion and feedback systems
- ☐ Peer feedback and community assessment processes
- ☐ Family and caregiver input opportunities

##### Feedback Topics and Areas:

- Payment levels and distribution timing
- Contribution recognition categories and verification
- Community governance and decision-making processes
- Technology platform usability and accessibility
- Innovation hub programming and opportunities
- Community relationship and social dynamics

#### Rapid Adaptation and Improvement

##### Policy Modification Process:

1. **Feedback Collection:** Systematic gathering of participant and community input
2. **Community Discussion:** Democratic dialogue about potential changes
3. **Pilot Testing:** Small-scale testing of proposed modifications
4. **Community Decision:** Democratic vote or consensus on policy changes
5. **Implementation:** Systematic rollout of approved modifications

##### Examples of Potential Adaptations:

- Adjusting payment amounts based on cost of living changes
- Adding new contribution recognition categories
- Modifying governance structures based on participation patterns
- Improving technology platform based on user experience
- Developing new innovation hub programming based on elder interests

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## Section 9: Cultural Adaptation and Inclusion

### 9.1 Indigenous Community Adaptation

#### Traditional Governance Integration

##### Respecting Indigenous Sovereignty:

- Pilot implementation controlled by tribal government or elder council
- Traditional elder leadership integrated with AUBI governance
- Cultural protocols for decision-making and resource distribution
- Traditional knowledge protection and intellectual property respect



**Cultural Practice Integration:**

- Recognition of traditional elder roles and responsibilities
- Integration of traditional healing and wellness practices
- Cultural ceremony and spiritual practice support
- Language preservation and transmission through elder leadership

**Community Self-Determination:**

- Indigenous community authority over pilot design and modification
- Traditional dispute resolution and community healing processes
- Cultural adaptation of contribution recognition and payment systems
- Protection of traditional knowledge and cultural sovereignty

**Traditional Knowledge Recognition****Environmental and Cultural Wisdom:**

- Traditional ecological knowledge documentation and recognition
- Cultural preservation activities as recognized contributions
- Environmental stewardship based on traditional practices
- Seasonal and cultural calendar integration with AUBI systems

**Contribution Recognition Adaptations:**

- Traditional healing and wellness support recognition
- Cultural education and language transmission recognition
- Traditional arts and craft creation recognition
- Community ceremony and spiritual leadership recognition

**9.2 Immigrant and Refugee Community Adaptation****Language and Cultural Accessibility****Multilingual Implementation:**

- AUBI materials and education in community languages
- Interpretation services for community meetings and enrollment
- Cultural liaison support for pilot participation
- Translation of key documents and technology platforms

**Cultural Practice Integration:**

- Recognition of cultural family and community support systems
- Integration of traditional elder roles and respect practices
- Cultural celebration and preservation as recognized contributions
- Religious and spiritual practice accommodation

**Documentation and Legal Support****Immigration Status Considerations:**

- Legal review of pilot participation requirements and implications
- Documentation assistance for elders without standard identification
- Privacy protection from immigration enforcement
- Legal advocacy and support for undocumented elders

**Family and Community Integration:**

- Extended family contribution recognition and support
- Community mutual aid and support network recognition
- Cultural organization leadership and participation recognition
- Transnational family care and support recognition

**9.3 Rural Community Adaptation****Geographic and Infrastructure Challenges****Rural Access and Technology:**

- Internet access improvement and subsidies for rural participants
- Mobile technology support and device provision
- Transportation assistance for community meetings and activities
- Telehealth integration with AUBI health and wellness support

**Local Economy Integration:**

- Agricultural and environmental stewardship contribution recognition
- Local business and cooperative development support
- Tourism and cultural economy development
- Rural innovation and problem-solving project support

**Community Network Adaptation****Existing Social Infrastructure:**

- Faith community integration and partnership
- Agricultural cooperative and community organization partnership
- Rural mutual aid and neighbor support network recognition
- Seasonal work and economic pattern adaptation

**Distance and Communication Challenges:**

- Distributed meeting and governance alternatives
- Technology platform adaptation for rural internet speeds
- Community liaison and support worker programs
- Regional coordination and resource sharing

**9.4 Urban Diversity and Complexity****Neighborhood and Community Definition****Urban Community Boundaries:**

- Neighborhood-based pilot implementation with clear geographic boundaries
- Cultural community integration across neighborhood boundaries
- Housing complex or community organization partnership
- Transportation network consideration for community participation

**Demographic Diversity Management:**

- Multi-cultural leadership development and representation
- Language diversity accommodation and interpretation
- Economic diversity integration and contribution recognition

- Accessibility accommodation for diverse ability levels

## Urban Resource and Challenge Integration

### Urban Assets and Opportunities:

- Public transportation integration with AUBI participation
- Urban innovation and technology access opportunities
- Cultural institution and community organization partnerships
- Healthcare and social service integration

### Urban Challenges and Solutions:

- Housing instability and gentrification impact consideration
- Community safety and security concerns
- Social isolation in high-density urban environments
- Economic inequality and displacement pressure management

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## Section 10: Implementation Support and Resources

### 10.1 Technical Assistance and Consultation

#### Elder Ambassador Program Connection

##### Ambassador Training and Support:

- Six-month intensive training in AUBI implementation and community organizing
- Ongoing consultation and mentorship for pilot communities
- Regional network development for experience sharing
- Advanced training in governance, innovation, and evaluation

##### Ambassador Roles in Pilot Support:

- Community education and AUBI principle training
- Governance structure development and democratic process facilitation
- Technology platform training and user support
- Innovation hub development and programming support

#### Professional and Academic Partnerships

##### Legal and Professional Services:

- Legal framework development and compliance review
- Financial management and audit support
- Technology platform development and security
- Healthcare and social service integration

##### Research and Evaluation Support:

- Research design development and methodology consultation
- Data collection and analysis training for community members
- Academic partnership development for research collaboration
- Publication and dissemination support for community-controlled research

## 10.2 Network Development and Peer Learning

### AUBI Pilot Community Network

#### Inter-Community Learning and Support:

- Regular video conferences and communication between pilot communities
- Community delegation visits and experience sharing
- Best practice documentation and adaptation guidance
- Joint problem-solving and innovation development

#### Regional and Cultural Networks:

- Regional pilot community coordination and resource sharing
- Cultural community networks for adaptation and learning
- Rural and urban community experience sharing
- International pilot community connection and learning

### Movement Building and Advocacy

#### Political Advocacy Coordination:

- Regional political organizing and policy advocacy coordination
- National AUBI movement building and political pressure
- International aging rights and AUBI advocacy
- Political candidate development and electoral strategy

#### Public Education and Cultural Change:

- Media strategy coordination and message development
- Community story sharing and narrative change
- Ageism interruption training and cultural transformation
- Educational institution integration and curriculum development

## 10.3 Scaling and Replication Support

### Documentation and Knowledge Sharing

#### Pilot Experience Documentation:

- Comprehensive pilot implementation guide development
- Video and multimedia training material creation
- Community story and impact documentation
- Challenge and solution documentation for future pilots

#### Replication Support Services:

- Community readiness assessment and capacity building
- Pilot design consultation and adaptation support
- Funding strategy development and resource mobilization
- Technology platform sharing and adaptation

### Policy Development and Advocacy

#### Policy Template Development:

- Model legislation for AUBI implementation
- Government partnership framework development

- Legal and regulatory compliance guidance
- International policy coordination and advocacy

#### **Evidence Building for Scaling:**

- Cross-pilot evaluation and impact assessment
- Cost-benefit analysis and economic modeling
- Policy maker education and evidence presentation
- Academic research coordination and publication

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## **Conclusion and Implementation Commitment**

### **Community Implementation Agreement**

#### **Community Commitment to AUBI Principles:**

- Recognition of elders as wisdom keepers and ongoing contributors
- Commitment to elder agency and democratic participation in all decisions
- Respect for cultural diversity and community self-determination
- Dedication to evidence building and knowledge sharing for AUBI advancement

#### **Pilot Implementation Commitment:**

- Full pilot duration participation and evaluation cooperation
- Democratic governance and community decision-making participation
- Contribution documentation and recognition system participation
- Innovation and community development activity engagement

#### **Community Benefits and Expectations:**

- Economic security and dignity for all pilot participants
- Community strengthening through elder leadership and participation
- Innovation and problem-solving capacity development
- Model development for scaling AUBI to other communities

### **Next Steps and Implementation Timeline**

#### **Immediate Actions (Next 30 Days):**

1. **Complete pilot design** using this template with community input
2. **Form implementation committee** with diverse elder leadership
3. **Begin funding strategy** development and resource mobilization
4. **Schedule community education** sessions and enrollment preparation

#### **Short-Term Goals (Next 6 Months):**

1. **Secure funding** and complete legal framework development
2. **Complete participant recruitment** and enrollment process
3. **Launch technology platform** and payment distribution system
4. **Begin pilot implementation** with community celebration

#### **Long-Term Vision (Next 3 Years):**

1. **Demonstrate AUBI effectiveness** through comprehensive evaluation
2. **Support AUBI scaling** to other communities and regions
3. **Contribute to policy development** for permanent AUBI implementation

#### 4. Build movement for aging transformation and elder rights

##### Framework Integration and Movement Building

This AUBI pilot represents one component of the comprehensive Aging Population Support Framework, integrating with:

- Elder innovation hubs and meaningful occupation opportunities
- Comprehensive healthcare and longevity support systems
- Social inclusion and intergenerational connection programs
- Governance systems enabling elder leadership from local to global levels

**The future of aging is elder-led, and AUBI provides the economic foundation enabling elders to design and lead their own support systems while creating regenerative economies that strengthen through their wisdom and participation.**

**Every elder deserves not just survival, but agency over a thriving life of purpose, connection, and respect. This AUBI pilot begins that transformation in your community today.**

**Implementation Support:** Visit [agingframework.org/aubi](https://agingframework.org/aubi) for additional resources, consultation support, and connection with other pilot communities.

**Community Network:** Join the Elder Ambassador program and AUBI pilot network for ongoing training, support, and experience sharing.

**\*\*The transformation begins now, with elders leading their own economic security and community development. Welcome to the regenerative aging economy.\*\***<sup>1</sup> Pre-Launch Phase (Months 1-6)

## Appendix A: Monthly Budget Worksheet

### AUBI Payment Calculation Template

**Base Security Layer** (Monthly): Participant Name: \_\_\_\_\_ Base Monthly Payment: \$\_\_\_\_\_ Current Income Assessment: \$\_\_\_\_\_ Net Base Security Payment: \$\_\_\_\_\_

**Contribution Recognition Layer** (Monthly):

- Caregiving Hours: \_\_\_\_ × \$\_\_\_\_ = \$\_\_\_\_\_
- Community Service Hours: \_\_\_\_ × \$\_\_\_\_ = \$\_\_\_\_\_
- Mentorship Hours: \_\_\_\_ × \$\_\_\_\_ = \$\_\_\_\_\_
- Innovation Projects: \_\_\_\_ × \$\_\_\_\_ = \$\_\_\_\_\_
- Environmental Stewardship: \_\_\_\_ × \$\_\_\_\_ = \$\_\_\_\_\_ **Total Contribution Recognition:** \$\_\_\_\_\_

**Adaptive Needs Layer** (Monthly):

- Health Status Adjustments: \$\_\_\_\_\_
- Care Requirement Adjustments: \$\_\_\_\_\_
- Life Transition Support: \$\_\_\_\_\_
- Emergency Assistance: \$\_\_\_\_\_ **Total Adaptive Needs:** \$\_\_\_\_\_

**Innovation Participation Layer** (Monthly):

- Innovation Hub Participation: \$\_\_\_\_\_
- Community Leadership Roles: \$\_\_\_\_\_

- Problem-Solving Projects: \$\_\_\_\_\_
  - Knowledge Documentation: \$\_\_\_\_\_ **Total Innovation Participation:** \$\_\_\_\_\_
- TOTAL MONTHLY AUBI PAYMENT:** \$\_\_\_\_\_

## Appendix B: Community Agreement Template

### AUBI Pilot Community Charter

**WE, THE ELDER COMMUNITY OF [COMMUNITY NAME], commit to these principles:**

#### **Elder Agency and Leadership:**

- Elders lead all decisions about AUBI design and implementation
- Democratic participation in governance and resource allocation
- Respect for diverse elder perspectives and cultural backgrounds
- Protection of elder autonomy and choice in all program aspects

#### **Community Mutual Support:**

- Recognition and celebration of all elder contributions
- Commitment to intergenerational cooperation and learning
- Support for community members facing challenges or crises
- Shared responsibility for program success and community wellbeing

#### **Transparency and Accountability:**

- Open communication about program operations and challenges
- Democratic oversight of funding and resource allocation
- Regular evaluation and improvement based on community feedback
- Commitment to evidence building and knowledge sharing

#### **Cultural Respect and Inclusion:**

- Honor diverse cultural approaches to aging and family
- Accommodate different languages, abilities, and preferences
- Integrate traditional knowledge and wisdom in program design
- Protect cultural sovereignty and community self-determination

#### **Participant Responsibilities:**

- Participate in democratic decision-making and community meetings
- Document contributions honestly and accurately
- Support other community members and maintain relationships
- Contribute to program evaluation and improvement

#### **Community Benefits:**

- Economic security and dignity for all participants
- Recognition and compensation for ongoing contributions
- Innovation opportunities and community problem-solving
- Intergenerational connection and wisdom sharing

#### **Conflict Resolution:**

- Address conflicts through community dialogue and mediation
- Respect diverse perspectives while building consensus



- Seek elder wisdom and cultural guidance in dispute resolution
- Maintain community relationships and mutual support

**Amendment Process:** This charter may be modified through democratic community process with \_\_\_\_ participation and \_\_\_\_ agreement threshold.

**Signatures:** Implementation Committee Members: \_\_\_\_\_ Date: \_\_\_\_\_  
 \_\_\_\_\_ Date: \_\_\_\_\_ \_\_\_\_\_ Date: \_\_\_\_\_

Community Representatives: \_\_\_\_\_ Date: \_\_\_\_\_ \_\_\_\_\_ Date: \_\_\_\_\_  
 \_\_\_\_\_ Date: \_\_\_\_\_

## Appendix C: Technology Platform Requirements

### Elder-Accessible Technology Specifications

#### User Interface Requirements:

- Large, clear fonts (minimum 16pt) with high contrast options
- Simple navigation with clear back/forward buttons
- Voice interaction capabilities for hands-free operation
- Multi-modal input (touch, voice, keyboard, assistive devices)
- Cognitive load adaptation based on user preferences

#### Accessibility Features:

- Screen reader compatibility for visual impairments
- Hearing aid compatibility and visual alerts
- Motor accessibility with large touch targets and alternative inputs
- Multilingual support with community language options
- Offline functionality for areas with limited internet

#### Privacy and Security:

- End-to-end encryption for all personal data
- Granular consent controls for data sharing
- Elder control over data access and deletion
- Community data sovereignty protections
- Regular security audits and updates

#### Core Functions:

- Contribution logging and verification system
- Payment tracking and notification
- Community communication and messaging
- Meeting scheduling and governance participation
- Innovation project collaboration tools

#### Support Infrastructure:

- 24/7 technical support hotline
- In-person technology training and assistance
- Peer elder technology mentorship program
- Video tutorials in multiple languages



- Alternative non-digital access for all functions

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## Implementation Checklist

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### Final Preparation Checklist

#### **Legal and Administrative** (Complete 30 days before launch):

- ☐ Legal framework and compliance verification
- ☐ Insurance and liability protection in place
- ☐ Banking and payment systems operational
- ☐ Community agreements signed and filed
- ☐ Government permits and approvals obtained

#### **Community and Participant Preparation** (Complete 14 days before launch):

- ☐ All participants enrolled and baseline data collected
- ☐ Community education sessions completed
- ☐ Elder leaders trained in governance and facilitation
- ☐ Conflict resolution processes established
- ☐ Community celebration and launch event planned

#### **Technology and Operations** (Complete 7 days before launch):

- ☐ Payment distribution system tested and operational
- ☐ Contribution documentation platform functional
- ☐ Community communication systems active
- ☐ Technical support and training programs ready
- ☐ Emergency backup systems tested

#### **Launch Day Preparation** (Complete 1 day before launch):

- ☐ First payments calculated and ready for distribution
- ☐ Community meeting space prepared and accessible
- ☐ Technology support staff and volunteers available
- ☐ Media and documentation plans ready
- ☐ Celebration and recognition materials prepared

### Success Celebration Planning

#### **Community Launch Celebration:**

- ☐ Intergenerational community gathering
- ☐ Recognition of elder leadership and contribution
- ☐ Cultural programming and community sharing
- ☐ Media coverage and story documentation
- ☐ Vision sharing for community transformation

#### **Ongoing Celebration and Recognition:**

- ☐ Monthly community achievement recognition
- ☐ Innovation project showcases and demonstrations

- ☐ Intergenerational learning and wisdom sharing events
  - ☐ Community contribution celebrations
  - ☐ Regional and network connection events
- 

**The future of aging is elder-led, and this AUBI pilot is your community's first step toward regenerative economics where elder wisdom drives innovation and economic systems strengthen through elder participation.**

**Every elder deserves not just survival, but agency over a thriving life of purpose, connection, and respect. Your AUBI pilot begins that transformation today.**

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*For additional support, consultation, and connection with other pilot communities, visit: [agingframework.org/aubi](https://agingframework.org/aubi)*

*Contact: [globalgovernanceframeworks@gmail.com](mailto:globalgovernanceframeworks@gmail.com)*

*The transformation begins now.*