

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
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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
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Section 6: Implementation Timeline and Milestones

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
-

Section 7: Risk Management and Contingency Planning

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

Section 8: Community Communication and Engagement

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
-

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
-

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
-

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 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.****¹ 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
-

Implementation Checklist

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.

*For additional support, consultation, and connection with other pilot communities, visit:
agingframework.org/aubi*

Contact: globalgovernanceframework@gmail.com

The transformation begins now.