

# Elder Economic Zone Planning Toolkit

Version 1.0 | June 2025

Global Governance Framework - Aging Population Support

## Overview and Vision

---

### What is an Elder Economic Zone?

An Elder Economic Zone (EEZ) is a designated geographic area with special policies, infrastructure, and incentives designed to:

- **Foster elder entrepreneurship** and business ownership
- **Create age-friendly employment** opportunities across all sectors
- **Encourage intergenerational collaboration** in business and innovation
- **Support aging-in-place** through accessible community design
- **Generate economic activity** that strengthens through elder participation

### Core Principles

**Elder Leadership:** Elders lead zone governance and business development decisions **Universal**

**Accessibility:** Infrastructure serves diverse abilities and aging needs **Economic Integration:**

Mixed-age businesses with elder mentorship and leadership **Innovation Focus:** Elder Innovation

Hubs as economic development anchors **Community Benefit:** Businesses contribute to elder community wellbeing

### Zone Vision Statement Template

*"The [Community Name] Elder Economic Zone will be a thriving business district where [specific elder population] leads economic development through [key industries/focus], creating [number] businesses and [number] jobs while serving as a model for age-friendly economic development nationwide."*

**Example:** "The Portland Elder Economic Zone will be a thriving business district where Pacific Northwest elders lead sustainable technology development, creating 200 businesses and 1,500 jobs while serving as a model for climate-adaptive economic development nationwide."

## Planning and Assessment

---

### Community Readiness Assessment

#### Elder Population Analysis

- Population size and demographics (age, income, education, cultural background)
- Professional expertise and business experience
- Entrepreneurial interests and innovation capacity
- Community organizing and leadership experience
- Existing elder-owned businesses and social enterprises

#### Economic Environment Assessment

- Local economic base and major industries
- Existing business support infrastructure
- Commercial real estate availability and costs
- Transportation and accessibility infrastructure

- Financial institutions and investment capacity

### **Political and Social Environment**

- Local government support for elder initiatives
- Community attitudes toward aging and elder business leadership
- Existing ageism in business and employment
- Intergenerational relationships and cooperation levels
- Advocacy organizations and community allies

## **Stakeholder Mapping and Engagement**

### **Primary Stakeholders**

- **Elder Community Leaders:** Business owners, former executives, community organizers
- **Local Government:** Economic development agencies, planning departments, elected officials
- **Business Community:** Chambers of commerce, business associations, financial institutions
- **Community Organizations:** Senior centers, advocacy groups, faith communities

### **Secondary Stakeholders**

- **Educational Institutions:** Universities, community colleges, vocational schools
- **Healthcare Providers:** Hospitals, clinics, aging services organizations
- **Real Estate Developers:** Commercial and residential property owners and developers
- **Transportation Agencies:** Public transit, ride services, accessibility advocates

### **Engagement Strategy Template**

1. **Elder Community Forums** (Monthly): Democratic planning sessions with elder community input
2. **Stakeholder Roundtables** (Quarterly): Multi-sector collaboration and resource sharing
3. **Public Information Sessions** (Bi-annual): Community education and feedback collection
4. **Government Relations** (Ongoing): Policy advocacy and regulatory navigation

## **Site Selection Criteria**

### **Accessibility Requirements**

- Public transportation access with elder-friendly stops and schedules
- Walkable design with appropriate lighting, seating, and weather protection
- Parking availability with accessibility spaces and convenient locations
- Street design supporting diverse mobility aids including wheelchairs and walkers

### **Infrastructure Capacity**

- Utility capacity for business development and technology infrastructure
- Telecommunications infrastructure supporting innovation and digital business
- Healthcare facility proximity for elder worker and customer needs
- Emergency services access and disaster preparedness capacity

### **Economic Development Potential**

- Commercial real estate availability at reasonable costs
- Proximity to existing business districts and economic activity
- Market access for elder-targeted and general consumer products/services
- Expansion capacity for zone growth and business development

### **Community Integration**

- Proximity to elder housing and intergenerational communities

- Integration with existing community facilities and services
- Cultural and recreational amenities supporting elder engagement
- Educational institution proximity for intergenerational collaboration

---

## Zone Design and Infrastructure

---

### Universal Design Principles

#### Physical Accessibility Standards

- **Building Design:** Ramps, wide doorways, accessible restrooms, elevator access
- **Signage:** Large, high-contrast fonts with multi-language options and Braille
- **Lighting:** Adequate illumination for vision changes with glare reduction
- **Acoustics:** Sound management for hearing aid compatibility and noise reduction

#### Transportation Infrastructure

- **Public Transit:** Elder-friendly bus stops with seating, weather protection, and clear signage
- **Pedestrian Design:** Wide sidewalks, rest areas, accessible crosswalks with extended timing
- **Parking Solutions:** Accessible spaces, covered parking, and reduced walking distances
- **Alternative Transportation:** Bike lanes, scooter access, and ride-sharing designated areas

#### Technology Integration

- **Digital Accessibility:** Public WiFi, device charging stations, and tech support areas
- **Cognitive Assistance:** Wayfinding systems, digital directories, and navigation assistance
- **Communication Systems:** Emergency alert systems, community bulletin boards, and information kiosks
- **Adaptive Interfaces:** Voice-activated systems and multi-modal interaction options

### Business Infrastructure Development

#### Elder Innovation Hub Integration

- **Maker Spaces:** Accessible workshops with adaptive tools and equipment
- **Technology Labs:** Computer facilities with elder-friendly interfaces and technical support
- **Collaboration Areas:** Meeting spaces designed for diverse abilities and communication styles
- **Business Incubation:** Office space, mentorship programs, and development resources

#### Shared Business Facilities

- **Community Kitchen:** Commercial kitchen space for food businesses and catering
- **Conference Centers:** Meeting facilities for business development and community events
- **Shipping and Receiving:** Centralized logistics support for small businesses
- **Professional Services:** Shared accounting, legal, marketing, and administrative support

#### Retail and Service Infrastructure

- **Mixed-Use Development:** Residential, commercial, and office space integration
- **Anchor Businesses:** Major retailers and services attracting foot traffic and economic activity
- **Pop-Up Spaces:** Flexible retail areas for testing business concepts and seasonal activities
- **Community Amenities:** Restaurants, cafes, parks, and gathering spaces

### Housing and Residential Integration

#### Elder-Friendly Housing Options

- **Accessible Apartments:** Universal design features with aging-in-place modifications

- **Intergenerational Housing:** Mixed-age communities with shared spaces and mutual support
- **Cooperative Housing:** Elder-owned housing with democratic governance and shared resources
- **Assisted Living Integration:** Care services within community rather than institutional isolation

#### Community Support Services

- **Healthcare Access:** Medical facilities, pharmacy, and wellness services within walking distance
- **Social Services:** Aging support, benefits assistance, and care coordination
- **Cultural and Recreation:** Arts centers, libraries, fitness facilities, and community programming
- **Food Access:** Grocery stores, farmers markets, and meal services with delivery options

## Business Development Programs

### Elder Entrepreneurship Support

#### Business Development Services

- **Idea Development:** Workshops helping elders identify business opportunities using their expertise
- **Market Research:** Assistance analyzing target markets and competitive landscapes
- **Business Planning:** Support developing comprehensive business plans and financial projections
- **Legal and Regulatory:** Navigation of business licenses, permits, and regulatory requirements

#### Skills Development and Training

- **Digital Literacy:** Technology training for online marketing, e-commerce, and digital business tools
- **Financial Management:** Accounting, bookkeeping, and financial planning for small businesses
- **Marketing and Sales:** Modern marketing techniques including social media and digital advertising
- **Operations Management:** Inventory, customer service, and business process optimization

#### Mentorship and Networking

- **Peer Mentorship:** Experienced elder entrepreneurs mentoring new business owners
- **Intergenerational Partnerships:** Collaboration between elder wisdom and younger technical skills
- **Professional Networks:** Connection with accountants, lawyers, marketers, and industry experts
- **Business Associations:** Elder entrepreneur groups for mutual support and advocacy

## Innovation and Technology Integration

#### Elder Innovation Hubs

- **Problem Identification:** Community challenges elder innovators can address through business solutions
- **Prototype Development:** Resources for testing and developing elder-led innovations
- **Technology Partnerships:** Collaboration with universities and tech companies for development support
- **Intellectual Property:** Legal assistance protecting elder innovations and ensuring benefit sharing

#### Technology Business Incubation

- **Tech Startups:** Support for elder-led technology businesses addressing aging-related challenges
- **Digital Services:** Business development for online consulting, education, and service provision
- **E-Commerce Support:** Assistance with online sales platforms and digital marketing
- **Software Development:** Collaboration with programmers for elder-designed applications and tools

### Research and Development

- **University Partnerships:** Collaboration with academic institutions on aging-related research and innovation
- **Corporate Collaboration:** Partnerships with businesses seeking elder expertise and market insights
- **Government Contracts:** Assistance accessing government research and development funding
- **Innovation Competitions:** Business plan competitions and innovation challenges with elder focus

## Employment and Workforce Development

### Age-Inclusive Employment Programs

- **Flexible Work Arrangements:** Part-time, seasonal, and project-based employment options
- **Skills-Based Hiring:** Employment focusing on experience and expertise rather than age
- **Workplace Accommodation:** Support for businesses creating age-friendly work environments
- **Career Transition:** Assistance for elders changing careers or moving from traditional employment to entrepreneurship

### Intergenerational Workforce Development

- **Mentorship Programs:** Formal programs pairing elder expertise with younger worker development
- **Knowledge Transfer:** Documentation and teaching of elder professional expertise
- **Cross-Training:** Programs where elders learn new skills while teaching traditional expertise
- **Team Building:** Workplace programs building cooperation and respect across age groups

### Professional Development

- **Continuing Education:** Learning opportunities for elders pursuing new interests and skills
- **Certification Programs:** Professional certifications in aging-related fields and emerging industries
- **Leadership Development:** Training for elder business and community leadership roles
- **Public Speaking:** Communication skills for elder advocacy, teaching, and business development

---

## Governance and Management

### Elder-Led Governance Structure

#### Elder Economic Zone Council

- **Composition:** Minimum 60% elder membership with diverse representation across cultural backgrounds, business experience, and community interests
- **Authority:** Policy development, business licensing recommendations, resource allocation, and performance evaluation
- **Meetings:** Monthly public meetings with quarterly community forums for broader input

- **Decision-Making:** Consensus-building processes respecting diverse elder perspectives

#### **Business Advisory Board**

- **Elder Entrepreneurs:** Successful elder business owners providing mentorship and guidance
- **Professional Expertise:** Accountants, lawyers, marketers, and industry specialists supporting business development
- **Community Representatives:** Leaders from elder organizations, advocacy groups, and community institutions
- **Government Liaisons:** Economic development officials and elected representatives providing policy support

#### **Community Oversight Committee**

- **Performance Monitoring:** Regular assessment of zone economic development and community benefit
- **Complaint Resolution:** Investigation and resolution of business disputes and community concerns
- **Policy Recommendations:** Advice to Zone Council on policy modifications and improvement opportunities
- **Public Accountability:** Annual reports to community on zone performance and elder benefit

### **Democratic Participation and Community Input**

#### **Community Decision-Making Processes**

- **Town Halls:** Quarterly community meetings for policy discussion and democratic input
- **Participatory Budgeting:** Elder community control over zone development funding and resource allocation
- **Working Groups:** Issue-specific committees addressing housing, transportation, healthcare, and business development
- **Cultural Committees:** Groups ensuring zone development respects diverse elder cultural communities

#### **Conflict Resolution and Mediation**

- **Mediation Services:** Professional conflict resolution for business disputes and community disagreements
- **Elder Arbitration:** Peer-based dispute resolution using elder community wisdom and experience
- **Appeal Processes:** Clear procedures for challenging zone decisions and seeking policy modifications
- **Community Healing:** Processes for addressing discrimination, ageism, and community division

#### **Transparency and Accountability**

- **Public Records:** Open access to zone council meetings, budget allocation, and policy decisions
- **Regular Reporting:** Monthly newsletters and annual reports on zone performance and community impact
- **Community Evaluation:** Regular surveys and feedback collection on zone effectiveness and elder satisfaction
- **Independent Audit:** Annual third-party evaluation of zone governance and economic impact

### **Legal and Regulatory Framework**

#### **Zone Designation and Legal Status**



- **Municipal Ordinance:** Legal establishment of zone boundaries, governance authority, and policy powers
- **Special Economic Status:** Tax incentives, regulatory flexibility, and business development support
- **Zoning Modifications:** Land use changes supporting mixed-use development and business integration
- **Building Code Adaptations:** Accessibility requirements and universal design standards for zone development

### Business Licensing and Regulation

- **Streamlined Processes:** Simplified business licensing with elder-friendly application procedures
- **Age Discrimination Prevention:** Strong enforcement of age discrimination laws in employment and services
- **Accessibility Compliance:** Mandatory accessibility standards for all businesses and developments
- **Community Benefit Requirements:** Business obligations to contribute to elder community development

### Funding and Financial Management

- **Zone Development Fund:** Municipal fund supporting infrastructure development and business incentives
- **Transparent Budgeting:** Public oversight of zone funding with elder community participation
- **Performance-Based Funding:** Continued support based on zone success in elder economic development
- **Private-Public Partnerships:** Collaboration with private developers and investors in zone development

---

## Financing and Incentives

---

### Public Funding Sources

#### Municipal and Local Government

- **Economic Development Grants:** Local government funding for business development and infrastructure
- **Tax Increment Financing:** Property tax increases from zone development funding additional improvements
- **Community Development Block Grants:** Federal funding for economic development in underserved communities
- **Brownfield Redevelopment:** Environmental cleanup funding for contaminated land development

#### State and Federal Programs

- **Small Business Administration:** Federal loans and grants for elder entrepreneurship and business development
- **Community Development Financial Institutions:** Specialized lending for community economic development
- **Workforce Development Grants:** Training and employment program funding
- **Aging Services Funding:** Support for elder services and community development

## Foundation and Private Grants

- **Aging Advocacy Foundations:** Grants from organizations supporting elder rights and community development
- **Economic Justice Funders:** Foundation support for community-controlled economic development
- **Innovation and Entrepreneurship:** Grants supporting elder innovation and business development
- **Climate Adaptation Funding:** Support for environmentally sustainable development and elder climate wisdom

## Business Incentives and Support

### Tax Incentives

- **Business Tax Credits:** Reduced business taxes for elder-owned enterprises and age-inclusive employers
- **Property Tax Abatement:** Reduced property taxes for businesses meeting accessibility and elder employment standards
- **Sales Tax Exemptions:** Reduced sales taxes for businesses providing elder-focused products and services
- **Payroll Tax Credits:** Employer incentives for hiring elder workers and providing age-inclusive benefits

### Financial Support Programs

- **Micro-Lending:** Small business loans with elder-friendly terms and application processes
- **Equipment Financing:** Low-interest loans for business equipment and accessibility modifications
- **Working Capital Support:** Short-term financing for business operations and inventory
- **Technical Assistance:** Free or low-cost business consulting and development services

### Real Estate and Infrastructure

- **Below-Market Rent:** Reduced commercial rent for elder entrepreneurs and age-inclusive businesses
- **Tenant Improvements:** Grants for accessibility modifications and universal design features
- **Shared Facilities:** Access to community kitchen, meeting spaces, and business equipment
- **Utility Assistance:** Reduced utility costs for businesses meeting elder employment and accessibility standards

## Private Investment and Partnership

### Social Impact Investment

- **Elder Economic Development Bonds:** Investment vehicles generating returns based on zone economic success
- **Community Development Financial Institutions:** Specialized lending focused on elder economic empowerment
- **Crowdfunding Platforms:** Community-based fundraising for elder business development
- **Angel Investor Networks:** Individual investors supporting elder entrepreneurship and innovation

### Corporate Partnerships

- **Anchor Institution Partnerships:** Collaboration with hospitals, universities, and major employers



- **Supply Chain Integration:** Corporate procurement from elder-owned businesses
- **Employee Volunteer Programs:** Corporate employee assistance with elder business development
- **Corporate Social Responsibility:** Business investment in zone development and elder community support

### Real Estate Development

- **Mixed-Use Development:** Private development of accessible housing, retail, and office space
- **Public-Private Partnerships:** Collaboration between government and private developers
- **Community Land Trusts:** Elder community ownership of land preventing gentrification
- **Cooperative Development:** Elder-owned housing and business cooperatives

## Implementation Timeline

### Phase 1: Planning and Preparation (Months 1-12)

#### Months 1-3: Assessment and Stakeholder Engagement

- Complete community readiness assessment and stakeholder mapping
- Conduct elder community forums and stakeholder roundtables
- Identify potential zone sites and complete initial feasibility analysis
- Begin relationship building with local government and business community

#### Months 4-6: Site Selection and Initial Design

- Complete detailed site analysis and selection process
- Develop preliminary zone design with elder community input
- Conduct environmental and infrastructure assessments
- Begin legal and regulatory framework development

#### Months 7-9: Legal Framework and Funding Development

- Draft zone designation ordinance and governance structure
- Complete funding strategy and begin grant applications
- Develop business incentive programs and regulatory framework
- Establish elder governance council and advisory structures

#### Months 10-12: Final Planning and Community Preparation

- Complete zone master plan with community approval
- Finalize legal framework and governance structure
- Secure initial funding and business partnerships
- Begin infrastructure development and business recruitment

### Phase 2: Infrastructure Development (Months 13-24)

#### Months 13-15: Infrastructure Construction

- Begin accessibility infrastructure development (sidewalks, lighting, signage)
- Start transportation improvements and public transit enhancements
- Develop technology infrastructure (WiFi, charging stations, digital systems)
- Begin renovation of existing buildings for business and community use

#### Months 16-18: Business Development Infrastructure

- Complete Elder Innovation Hub construction and equipment installation

- Develop shared business facilities (kitchen, meeting spaces, services)
- Establish business support services and professional partnerships
- Begin marketing and business recruitment efforts

#### **Months 19-21: Housing and Community Development**

- Complete accessible housing development and community spaces
- Develop community support services (healthcare, social services, recreation)
- Establish community programming and cultural facilities
- Begin resident recruitment and community building

#### **Months 22-24: Final Infrastructure and Preparation**

- Complete all infrastructure development and accessibility features
- Finalize business support systems and professional service partnerships
- Conduct community readiness assessment and final preparations
- Launch marketing and business recruitment campaign

### **Phase 3: Business Development and Operations (Months 25-36)**

#### **Months 25-27: Initial Business Development**

- Launch Elder Innovation Hub with initial cohort of elder entrepreneurs
- Begin business incubation and mentorship programs
- Open first elder-owned businesses and anchor tenants
- Establish community programming and services

#### **Months 28-30: Business Expansion and Community Growth**

- Expand business development programs and entrepreneur support
- Recruit additional businesses and complete tenant buildout
- Launch employment programs and workforce development
- Develop community events and cultural programming

#### **Months 31-33: Zone Operations and Community Integration**

- Achieve target business occupancy and employment levels
- Establish community governance and participatory budgeting
- Launch intergenerational programming and community partnerships
- Begin performance monitoring and evaluation

#### **Months 34-36: Evaluation and Expansion Planning**

- Complete initial performance evaluation and community assessment
- Plan zone expansion and additional business development
- Document best practices and lessons learned
- Begin replication planning for additional zones

### **Phase 4: Evaluation and Replication (Months 37-48)**

#### **Months 37-39: Comprehensive Evaluation**

- Complete comprehensive zone performance evaluation
- Assess elder community satisfaction and economic impact
- Evaluate business success and employment outcomes
- Document lessons learned and best practices

#### **Months 40-42: Community Feedback and Improvement**

- Conduct community feedback sessions and improvement planning
- Implement zone modifications based on evaluation results
- Expand successful programs and modify underperforming initiatives
- Plan long-term sustainability and growth strategies

#### **Months 43-45: Replication and Knowledge Sharing**

- Develop replication toolkit and best practice documentation
- Share lessons learned with other communities and organizations
- Provide technical assistance for additional zone development
- Establish network of Elder Economic Zones for mutual support

#### **Months 46-48: Long-Term Planning and Sustainability**

- Develop 10-year zone development and sustainability plan
- Establish permanent funding and governance structures
- Plan zone expansion and additional business development
- Celebrate achievements and community success

---

## **Evaluation and Success Metrics**

---

### **Economic Development Indicators**

#### **Business Development Metrics**

- **Number of Elder-Owned Businesses:** Target 50 businesses by year 3
- **Business Survival Rate:** 80% business survival after 2 years
- **Employment Creation:** 500 new jobs with 40% elder workers
- **Revenue Generation:** \$10 million annual business revenue

#### **Economic Impact Measurements**

- **Local Economic Activity:** Increased spending and investment in surrounding community
- **Property Values:** Stable or increased property values without displacement
- **Tax Revenue:** Increased municipal tax revenue from business activity
- **Outside Investment:** Attracted private investment and business development

#### **Innovation and Development**

- **Patents and Intellectual Property:** Elder innovations generating intellectual property
- **Technology Transfer:** Commercialization of elder-led innovations
- **Research Collaboration:** University and corporate research partnerships
- **Innovation Awards:** Recognition for elder innovation and business success

### **Social and Community Impact**

#### **Elder Wellbeing Measures**

- **Purpose Score:** Meaningful activity engagement and community contribution
- **Economic Security:** Income adequacy and financial independence
- **Social Connection:** Reduced isolation and increased community participation
- **Agency and Control:** Decision-making autonomy and life satisfaction

#### **Community Integration**

- **Intergenerational Programming:** Youth-elder collaboration and mutual learning
- **Ageism Reduction:** Decreased age discrimination and stereotyping

- **Community Cohesion:** Increased cooperation and mutual support
- **Cultural Programming:** Arts, culture, and community events

### Accessibility and Inclusion

- **Physical Accessibility:** Universal design implementation and barrier removal
- **Transportation Access:** Public transit use and mobility support
- **Technology Inclusion:** Digital literacy and technology adoption
- **Cultural Diversity:** Participation across elder cultural communities

## Governance and Democracy

### Elder Leadership Development

- **Democratic Participation:** Elder involvement in zone governance and decision-making
- **Leadership Skills:** Development of elder leadership capacity and community organizing
- **Policy Influence:** Elder input in municipal and regional policy development
- **Advocacy Effectiveness:** Success in aging rights and community advocacy

### Community Governance

- **Participatory Budgeting:** Community control over zone development and resource allocation
- **Conflict Resolution:** Effective mediation and problem-solving
- **Transparency:** Open governance and community accountability
- **Community Satisfaction:** Elder satisfaction with governance and community development

## Environmental and Sustainability

### Environmental Impact

- **Sustainable Development:** Green building practices and environmental protection
- **Transportation Sustainability:** Reduced car dependence and increased walking/transit
- **Energy Efficiency:** Renewable energy use and energy conservation
- **Waste Reduction:** Recycling, composting, and waste minimization

### Climate Adaptation

- **Elder Climate Wisdom:** Integration of elder environmental knowledge in planning
- **Disaster Preparedness:** Community resilience and emergency response capacity
- **Green Infrastructure:** Parks, gardens, and natural systems
- **Climate Education:** Community education on climate adaptation and sustainability

---

## Templates and Checklists

### Community Readiness Assessment Checklist

**Elder Community Analysis** ☐ Elder population demographics and geographic distribution ☐ Professional expertise and business experience inventory ☐ Entrepreneurial interests and innovation capacity assessment ☐ Existing elder-owned businesses and social enterprises ☐ Community organizing experience and leadership capacity ☐ Cultural diversity and language communities ☐ Economic status and business capital availability ☐ Health status and accessibility needs

**Economic Environment Assessment** ☐ Local economic base and major industries analysis ☐ Commercial real estate availability and cost analysis ☐ Business support infrastructure and services inventory ☐ Financial institutions and lending capacity ☐ Transportation and accessibility

infrastructure □ Utility capacity and technology infrastructure □ Market analysis for elder-focused products and services □ Competition analysis and market opportunities

**Political and Social Environment** □ Local government support for elder initiatives □ Community attitudes toward aging and elder business leadership □ Existing ageism in business and employment □ Intergenerational relationships and cooperation levels □ Advocacy organizations and community allies □ Media coverage and public opinion □ Regulatory environment and zoning flexibility □ Community organizing capacity and social capital

## Zone Development Planning Template

### Vision and Mission Statement

- Zone Vision: [Describe the long-term vision for the Elder Economic Zone]
- Mission Statement: [Define the purpose and goals of the zone]
- Core Values: [List the fundamental principles guiding zone development]
- Success Definition: [Describe what success looks like for the zone and elder community]

### Geographic and Physical Planning

- Zone Boundaries: [Define the specific geographic area included in the zone]
- Land Use Plan: [Describe the mix of commercial, residential, and community space]
- Accessibility Design: [Detail universal design features and accessibility accommodations]
- Transportation Plan: [Outline public transit, pedestrian, and parking improvements]

### Economic Development Strategy

- Target Industries: [Identify the business sectors and industries the zone will focus on]
- Business Recruitment: [Describe strategies for attracting elder entrepreneurs and age-inclusive businesses]
- Employment Goals: [Set targets for job creation and elder employment]
- Innovation Focus: [Define the role of elder innovation and technology development]

### Community Development Plan

- Housing Integration: [Describe the mix of housing options and accessibility features]
- Community Services: [List healthcare, social services, and community amenities]
- Cultural Programming: [Outline arts, culture, and community events]
- Intergenerational Programs: [Describe youth-elder collaboration and learning opportunities]

## Business Development Program Framework

### Elder Entrepreneur Support Services

- Business Development: Idea development, market research, business planning, legal assistance
- Skills Training: Digital literacy, financial management, marketing, operations management
- Mentorship: Peer mentorship, intergenerational partnerships, professional networks, business associations
- Financial Support: Micro-lending, equipment financing, working capital, grants and incentives

### Innovation and Technology Program

- Innovation Hub: Problem identification, prototype development, technology partnerships, intellectual property
- Technology Business: Tech startups, digital services, e-commerce, software development
- Research and Development: University partnerships, corporate collaboration, government contracts, innovation competitions
- Knowledge Transfer: Documentation, teaching, cross-training, mentorship

## Employment and Workforce Development

- Age-Inclusive Employment: Flexible work, skills-based hiring, workplace accommodation, career transition
- Intergenerational Workforce: Mentorship programs, knowledge transfer, cross-training, team building
- Professional Development: Continuing education, certification, leadership development, communication skills
- Community Leadership: Governance training, advocacy skills, public speaking, organizing capacity

## Governance Structure Template

### Elder Economic Zone Council

- **Chair:** [Elder community leader elected by council members]
- **Vice-Chair:** [Elder community leader providing backup leadership]
- **Elder Members** (minimum 60%): [Representatives from diverse elder communities]
- **Community Representatives:** [Leaders from advocacy groups and community organizations]
- **Business Representatives:** [Elder entrepreneurs and business leaders]
- **Professional Members:** [Accountants, lawyers, and industry specialists]
- **Government Liaisons:** [Economic development officials and elected representatives]

### Council Responsibilities

- Policy development for zone governance and business development
- Business licensing recommendations and regulatory oversight
- Resource allocation and budget approval
- Performance evaluation and community accountability
- Conflict resolution and community mediation
- Public representation and advocacy

### Meeting Structure

- Monthly council meetings with public access and community input
- Quarterly community forums for broader elder community participation
- Annual community assemblies for major policy decisions and evaluation
- Special meetings for urgent issues and emergency response

## Funding and Financial Planning Worksheet

### Public Funding Sources

- Municipal Economic Development: \$[amount] from [specific programs]
- State and Federal Grants: \$[amount] from [specific agencies and programs]
- Community Development: \$[amount] from [CDBG, CDFI, and other programs]
- Foundation Grants: \$[amount] from [specific foundations and grant programs]
- **Total Public Funding:** \$[total amount]

### Private Investment and Partnership

- Social Impact Investment: \$[amount] from [impact investors and development bonds]
- Corporate Partnerships: \$[amount] from [anchor institutions and business partnerships]
- Real Estate Development: \$[amount] from [private developers and land partnerships]
- Crowdfunding and Community: \$[amount] from [community fundraising and small donations]



- **Total Private Investment:** \$[total amount]

### **Business Revenue and Sustainability**

- Business License Fees: \$[amount] annually from [estimated number of businesses]
- Property Management: \$[amount] annually from [commercial rent and property management]
- Program Revenue: \$[amount] annually from [training programs and business services]
- Grant Administration: \$[amount] annually from [grant management and technical assistance]
- **Total Annual Revenue:** \$[total amount]

### **Expense Planning**

- Infrastructure Development: \$[amount] for [accessibility, transportation, technology]
- Business Development: \$[amount] annually for [training, mentorship, technical assistance]
- Community Services: \$[amount] annually for [programming, events, support services]
- Operations and Management: \$[amount] annually for [staff, governance, administration]
- **Total Annual Expenses:** \$[total amount]

## **Performance Monitoring and Evaluation Framework**

### **Economic Development Tracking**

- Business Development: Number of businesses, survival rate, employment creation, revenue generation
- Economic Impact: Local spending, property values, tax revenue, outside investment
- Innovation: Patents, technology transfer, research collaboration, awards and recognition
- Elder Employment: Job creation, age-inclusive hiring, workplace accommodation, career transition

### **Community Impact Assessment**

- Elder Wellbeing: Purpose score, economic security, social connection, agency and control
- Community Integration: Intergenerational programming, ageism reduction, community cohesion, cultural programming
- Accessibility: Physical accessibility, transportation access, technology inclusion, cultural diversity
- Health and Safety: Healthcare access, emergency preparedness, crime reduction, community safety

### **Governance and Democracy Evaluation**

- Elder Leadership: Democratic participation, leadership development, policy influence, advocacy effectiveness
- Community Governance: Participatory budgeting, conflict resolution, transparency, community satisfaction
- Cultural Respect: Indigenous partnership, cultural adaptation, religious integration, language access
- Legal Protection: Age discrimination prevention, elder abuse protection, rights advocacy, legal support

### **Data Collection Methods**

- Quarterly Business Surveys: Business owners and managers assess zone effectiveness and support needs
- Annual Community Assessment: Elder residents evaluate zone impact on quality of life and community wellbeing

- Bi-annual Stakeholder Interviews: Key stakeholders assess zone performance and recommend improvements
- Monthly Performance Reports: Zone management tracks key indicators and reports to council and community

## Conclusion and Next Steps

The Elder Economic Zone Planning Toolkit provides comprehensive guidance for communities ready to lead economic development that strengthens through elder participation. Success requires elder leadership, community commitment, and recognition that aging represents accumulated value rather than diminished capacity.

### Immediate Next Steps:

1. Complete Community Readiness Assessment using provided checklists
2. Organize Elder Community Forums to build democratic participation
3. Conduct Stakeholder Mapping and begin relationship building
4. Identify potential zone sites and complete preliminary feasibility analysis
5. Begin policy advocacy for zone designation and government support

### Long-Term Commitments:

- Elder leadership and democratic governance throughout development process
- Universal accessibility and age-friendly design in all infrastructure
- Business development that serves elder community while building economic sustainability
- Intergenerational collaboration and community integration
- Performance monitoring and continuous improvement based on elder community evaluation

### Resources and Support:

- Visit [agingframework.org/zones](https://agingframework.org/zones) for additional resources and community connection
- Contact [globalgovernanceframework@gmail.com](mailto:globalgovernanceframework@gmail.com) for technical assistance and consultation
- Join the Elder Economic Zone Network for peer support and best practice sharing
- Access funding database and grant writing assistance through framework resource library

**The future of economic development is elder-led. Begin building your Elder Economic Zone today.**

**About This Toolkit:** Developed through collaboration with elder community leaders, economic development professionals, and successful aging-focused business districts. Maintained by the Global Governance Framework team with ongoing updates based on implementation experience and community feedback.

**Version Updates:** This toolkit will be updated annually based on implementation experience and community feedback. Submit suggestions and lessons learned to [globalgovernanceframework@gmail.com](mailto:globalgovernanceframework@gmail.com).

**Elder Leadership Commitment:** All Elder Economic Zone development must maintain elder leadership and democratic governance throughout the planning, implementation, and evaluation process. Economic development serves elder community wellbeing and continues to strengthen through elder participation.

*[globalgovernanceframework.org/tools/aging](http://globalgovernanceframework.org/tools/aging)*