Age-Friendly Community Initiatives in the Early Planning Phase:
Perspectives on *Why*, *How*, and *Who* from Northern New Jersey

Residents of Garfield, NJ, gather at the municipal health department to participate in a weekly walking club. Three volunteer residents started the club upon learning about the development of the community's age-friendly initiative.

Age-friendly community initiatives (AFCIs) are coordinated efforts across multiple sectors to make local communities better places "to grow up and grow old."[1] Since January of 2016, planning grants from two foundations have spurred the development of nine AFCIs across twelve municipalities in northern New Jersey. Based on in-depth interviews with project leaders, this report provides an overview of these initiatives during their early planning phase. It identifies two inter-related goals of the early planning phase: better understanding aging in the community and greater engagement of local stakeholders around aging. The report describes assessing the community, meeting and communicating with stakeholders, and facilitating communitywide communications as three categories of activities working toward these goals. The report then discusses the roles of key people and organizations involved in these activities, including the lead organizations and project coordinators; consultants; organizational partners; locally elected officials; individual volunteers and interns; funders; and leaders of other AFCIs. Results from this study can help to expand the reach and impact of age-friendly efforts in northern New Jersey and beyond.

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Introduction

The aging of the world's population is among the most significant demographic phenomenon of our time. In the United States alone, approximately one out of every seven individuals now alive is age 65 and older. By 2040, this ratio will become over one in five. Moreover, the total number of older Americans is expected to double from 2014 to 2060, with approximately 98 million older people when today's adolescents and young adults reach their later years.[2]

Population aging matters not only for individuals and families, but also for local communities and neighborhoods. The idea that localities influence, and are influenced by, the aging of their residents is paramount within the growing "age-friendly" movement. This movement emphasizes ways in which communities can enhance local environments to optimize the mental, physical, and social well-being of older residents, thereby potentially benefiting people of all ages.[2]

Age-friendly community initiatives (AFCIs) have emerged as part of this movement over the past 10 years. AFCIs are broadly defined as coordinated efforts across multiple sectors within local communities to make social and physical environments more conducive to older adults' health, well-being, and community participation.[3] AFCIs convene people from diverse sectors to formulate and implement action plans that can help to make their local communities more supportive and inclusive of older adults. The World Health Organization's framework on domains of age-friendliness, as summarized in Table 1, guides many communities' efforts. Examples of AFCI implementation activities include:[4]

- Advocating for improvements to roads and walking paths to enhance safety for drivers and pedestrians of diverse mobility levels

- Working with local zoning boards to promote the development of new and affordable senior housing

- Facilitating the introduction of a farmer's market where people of all ages can access fresh produce

Leading frameworks for AFCIs indicate the importance of not just age-friendly actions, but also planning for such action.[6,7] For example, AARP, an organization that supports the development of AFCIs in the United States, describes four components in the planning phase:

(a) establish ways for older adults to be involved in the AFCI;
(b) conduct a baseline assessment of the community's age-friendliness;
(c) develop a communitywide action plan following from the assessment findings; and
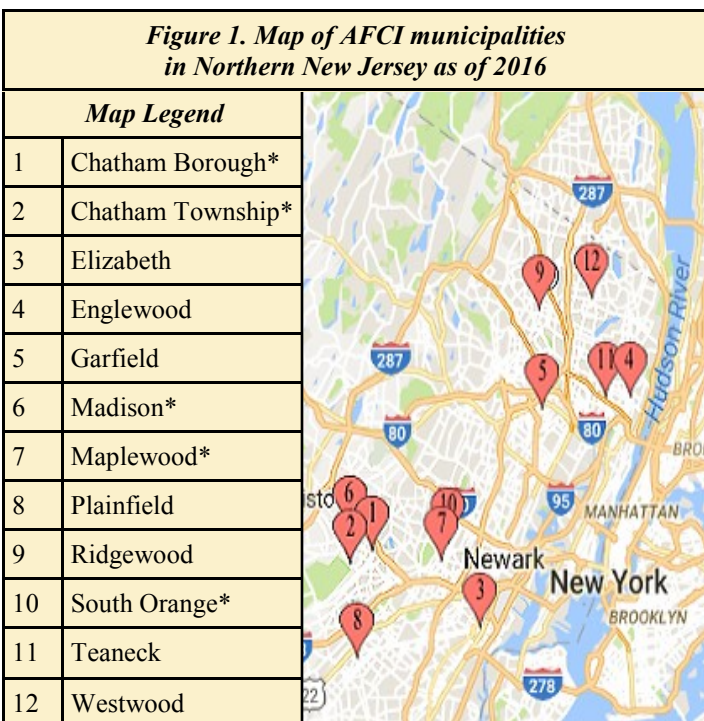(d) create metrics to monitor progress toward planned goals.

Table 1. World Health Organization's Domains of Age-Friendliness[4]	
Domains	**Sample Indicators**
Outdoor Space and Buildings	Well-maintained outdoor seating near transit, parks, and other public spaces
Transportation	Availability of supports for older drivers, such as refresher courses and accessible and affordable parking
Housing	Availability of a range of housing options with supportive services for all older residents
Social Participation	Targeted outreach about community events for socially isolated older adults
Respect and Social Inclusion	Officials actively involve older adults in community decision making, including those who are economically disadvantaged
Civic Participation and Employment	Availability of training for older workers and volunteers
Communication and Information	Publically accessible internet at no or little cost
Community and Health Services	Service professionals with skills and knowledge in the field of aging

Beyond such descriptions, however, there has been very little in-depth exploration of what exactly the planning phase for an AFCI entails and how community leaders perceive the importance of this phase for longer-term goals and objectives. Better understanding the planning phase for AFCIs is important for reasons including (a) helping stakeholders who are considering the start-up of an AFCI to assess organizational and community readiness for adoption; (b) assisting AFCI leaders in the early phases to benchmark their primary activities and accomplishments; and (c) describing similarities and differences across the implementation of AFCIs from their very beginning.

This report draws on data collected from in-depth interviews with leaders of nine newly initiated AFCIs in northern New Jersey in 2016. The aim of this research was to advance understanding of the early planning phases of AFCIs by addressing the following questions:

1. *Why:* What are the primary goals of AFCIs in the early planning phase?

2. *How:* What are the primary activities of AFCIs in the early planning phase?

3. *Who:* Who are the key individuals and organizations involved in AFCIs' early planning phase?

Figure 1. Map of AFCI municipalities in Northern New Jersey as of 2016	
Map Legend	
1	Chatham Borough*
2	Chatham Township*
3	Elizabeth
4	Englewood
5	Garfield
6	Madison*
7	Maplewood*
8	Plainfield
9	Ridgewood
10	South Orange*
11	Teaneck
12	Westwood

* Madison and the Chathams, as well as South Orange and Maplewood, each constituted single initiatives.

Background on AFCIs in Northern New Jersey

This research is part of a larger initiative to support the development of AFCIs in northern New Jersey. Two local philanthropies—The Grotta Fund for Senior Care and The Henry and Marilyn Taub Foundation—began spearheading this regional initiative in 2015. The Grotta Fund seeks to benefit older individuals and families in Essex, Union, Morris, Sussex, and eastern Somerset Counties.[8] The Taub Foundation focuses, in part, on supporting high-quality programs and services for older adults in Bergen and Passaic Counties.[9] These philanthropies collaboratively encouraged community leaders within their respective geographies to apply for an AFCI planning grant. Across both organizations' catchment areas, eight communities received AFCI planning grants beginning in January of 2016, and a ninth community joined the regional initiative in March of 2016.

Planning grants were for up to $35,000 to be used over a multi-month period, with the purpose of conducting "a planning study of a local region, town, or community, resulting in the creation of an action plan among collaborators to improve the community and its age-friendliness."[10] The planning grants were designed as the first of a two-phase process, with the second phase providing additional funds for implementing actions plans over a possible three-year period. Additional information about the funding initiative is located in the text box on p. 4 of this report.

Figure 1 displays a map of the municipalities that received planning grants for their AFCIs. Seven of the nine AFCIs focused on a single municipality, whereas two focused on more than one (Maplewood and South Orange; Madison and the Chathams). Moreover, five of the nine initiatives were located in Bergen County, and the four others were located throughout Essex, Morris, and Union Counties.

As Table 2 indicates (p. 4), municipalities varied in terms of their size and the sociodemographic characteristics of their residents. Seven of the nine initiatives represented catchment areas with populations between 25,000 and 50,000 people (Englewood, Garfield, Madison/Chatham Township/Chatham Borough, Plainfield, Ridgewood, South Orange/Maplewood, Teaneck). One initiative developed in a less populated area (Westwood) and another in a more populated area (Elizabeth).

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Table 2. Demographic Characteristics of the AFCI Municipalities in Northern New Jersey							
	Total Population Size	Population 62+	Population Non-Hispanic White	Owner–Occupied Housing Units	Median Household Income	Mean Retirement Income	Population 65+ with Bachelor's Degree or Higher
Chatham Borough*	8,962	12.8%	87.3%	79.3%	$144,179	$25,868	50.9%
Chatham Township*	10,452	18.5%	88.0%	81.9%	$135,497	$44,815	55.9%
Elizabeth	124,969	11.6%	18.2%	26.7%	$43,966	$16,687	12.2%
Englewood	27,147	7.2%	31.2%	54.2%	$73,249	$29,115	39.7%
Garfield	30,487	5.6%	58.9%	38.4%	$46,499	$15,932	8.0%
Madison*	15,845	16.9%	81.0%	65.6%	$109,737	$33,105	36.8%
Maplewood^	23,867	13.9%	52.7%	78.4%	$116,014	$30,170	45.8%
Plainfield	49,808	12.0%	8.3%	50.0%	$53,099	$24,606	17.1%
Ridgewood	24,958	15.8%	78.4%	79.9%	$141,315	$34,231	55.7%
South Orange^	16,198	13.4%	57.0%	71.0%	$119,888	$39,968	51.2%
Teaneck	39,776	18.4%	46.1%	76.7%	$95,435	$33,635	44.5%
Westwood	10,908	20.0%	75.6%	61.9%	$85,588	$26,220	24.7%

Data taken from the 2010 U.S. Census for population size, ages 62+, non-Hispanic white, and owner occupied housing units.
Data taken from the 2010-2014 American Community Survey on income and education.
* = Part of three-municipality initiative
^ = Part of a two-municipality initiative

Launching Age-Friendly Community Initiatives in Northern New Jersey

Renie Carniol, Director of The Grotta Fund for Senior Care
Julia Stoumbos, Program Officer of The Henry and Marilyn Taub Foundation

We learned about age-friendly communities through various newsletters and conference presentations, as well as by speaking with colleagues. Right away, we both knew that our organizations would be interested in getting more involved. We became familiar with some great success stories from around the country and were enthused by the idea of having community partners explore creative ways to prepare for the growing and evolving needs of an aging population. We also recognized that no one else was making a wide-sweeping effort to bring age-friendly models to northern New Jersey. We further understood how strong, local non-profits were doing great work in their own niches—helping seniors age in place—and saw the potential for age-friendly community initiatives to build from these strengths. After discussion with various parties, our boards decided to adopt age-friendly community initiatives as a goal for our organizations over the next several years.

One reason why this grant-making opportunity is unique for us is because it involves our two organizations working together. Our collaboration has allowed the initiative in northern New Jersey to be much larger than it would have been within either of our catchment areas alone. This "strength in numbers" has been helpful for many reasons. To begin, each of us has been able to tap into our own professional networks for the benefit of all grantees. Because there are so many different aspects to age-friendliness—housing, transportation, communications, service delivery, community development, public relations, etc.—we have found it especially valuable to be able to draw on our diverse professional contacts and to share opportunities for learning. The regional initiative also is helpful for drawing more attention to the work locally, statewide, and nationally. Also, we have found that creating this initiative as part of a broader regional effort is energizing to our own organizations and the grantees as well. Having a larger group of communities throughout the region engaged in age-friendly helps to connect these efforts to a sense of a larger movement. We look forward to sustaining this momentum as the initiatives continue to develop over the coming years.

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The municipalities also ranged in their percentage of people ages 62 years and over (5.6 to 18.5 percent), their percentage of people who identified as non-Hispanic White (8.3 to 87.3 percent), their percentage of owner-occupied housing units (26.7% to 81.9%), their median household income ($46,499 to $144,179), their mean retirement income ($15,932 to $44,815), and their population 65 years and over with a bachelor's degree or higher (8.0% to 55.7%).

Table 3 on this page describes the range of administrative structures for the nine AFCIs in terms of their lead organizations and project coordinators. For three initiatives, the project coordinators were existing staff members within private, nonprofit organizations, which served as the AFCIs' lead and fiduciary organizations. In two other cases, the project coordinator was hired by a private, not-for-profit organization. For the four remaining initiatives, the project coordinator was staffed within, or worked directly in partnership with, municipal government entities.

Leaders of the AFCI in Madison and the Chathams, NJ, convene to discuss strategies for developing their initiative.

Table 3. Administrative Structures and Lead Organizations for the AFCIs During the Early Planning Phase*	
AFCI Location	**Lead Organizations**
Project Coordinator Staffed from within Private, Non-for-Profit Organizations	
Elizabeth	Jewish Family Service of Central New Jersey
Plainfield	United Way of Greater Union County
Teaneck	Geriatric Services, Inc.
Project Coordinator Hired by Private, Non-for-Profit Organizations	
Englewood	Outside project coordinator hired by the Southeast Senior Center for Independent Living (fiduciary organization)
Westwood	Outside project coordinator hired by, and working with, Pascack Valley Meals on Wheels (fiduciary and lead organization)
Project Coordinator Staffed from within, or Affiliated with, Municipal Entities	
Garfield	Health Department of Garfield with funding from the Garfield Community Trust (fiduciary organization)
Madison and the Chathams	Health Department of the Borough of Madison
Ridgewood	Outside project coordinator hired by the Ridgewood Community Trust (fiduciary organization) in partnership with the municipal Community Center Advisory Board
South Orange/ Maplewood	Outside project coordinator hired by, and working in partnership with, the municipal governments of South Orange and Maplewood (fiduciary and lead organizations)

* Information current as of August of 2016.

Research Study Overview

This research study was designed as a developmental evaluation, which is a type of inquiry that is especially useful for understanding programs and services that are dynamic, innovative, and complex. A key aim of developmental evaluation is to understand a program model as it evolves over time, while also using research methods to contribute to its development.[11] Accordingly, the researcher (the report's author) was an active member of the region's AFCI development team—working closely with the funding organizations, grantees, and other constituents—and participated in discussions that influenced the direction of programmatic activities. For example, the researcher helped to plan presentations at grantee meetings, responded to individual grantee's requests for information, organized a resource repository for grantees, and regularly corresponded with the funders to help shape the regional initiative.

Findings in this report are based on in-depth interviews conducted with the AFCI project leaders in 2016. The interviews took place twice—approximately one month and five months into the grantees' planning periods. The number of participants at each interview varied according to the preferences and availability of the interviewees, ranging from the AFCI project coordinator alone to a group of people from the lead and partnering organizations. All interviews were conducted in private locations, and participants were assured that the data from the interviews would remain confidential.
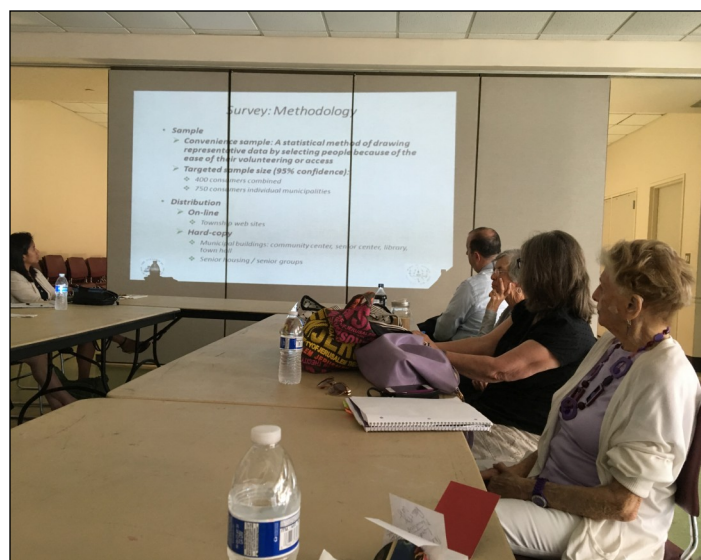
This study used a semi-structured interviewing technique. All interviews covered the same major topic areas, yet questions were customized to explore particular themes in more or less depth as each interview progressed and the study evolved. Topic areas were derived from the Grantmakers in Aging's framework for sustaining age-friendly efforts,[12] including questions concerning building public will, engaging across sectors, utilizing metrics, securing resources, and advancing age-friendly public policies, practice, and funding. Examples of interview questions included:

- Describe your experiences of building partnerships for your initiative.

- How do you think the results from your communitywide survey will be useful for action?

- What do you see as the purpose of your initiative's steering committee at this time?

Each interview was approximately 90 minutes in duration, and all interviews were audio-recorded, transcribed, and analyzed within qualitative data analysis software. An earlier draft of this report was shared with the funders and AFCI project coordinators. Their feedback was incorporated within the final version to help ensure that results accurately capture predominant perspectives on AFCIs during the early planning phase. Results are presented according to the study's three major research questions (i.e., the *why*, *how*, and *who* of the early planning phase), as listed on p. 3.

A social worker in Englewood, NJ, assists a resident in senior housing to complete the Age-Friendly Englewood survey questionnaire.

Stakeholders gather at a senior center in Maplewood, NJ, to learn about the South Orange/Maplewood age-friendly assessment.

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WHY: What are the Primary Goals of AFCIs in the Early Planning Phase?

Analysis of the interviews identified two goals for AFCIs during the early planning phase: better understanding aging in the community, and greater engagement of local stakeholders around aging. Each of these goals, as well as how participants viewed their inter-related importance for longer-term age-friendly action, is described below.

Better Understanding of Aging in the Community

Participants identified better understanding aging in their communities as a primary aim of the planning phase, with an emphasis on developing knowledge based on local data. Although AFCI leaders generally came into the project with their own understanding of older residents, they approached the planning phase as an opportunity to:

- Systematically test their and others' impressions of aging in the community;
- Identify gaps in knowledge and what to learn more about;
- Generate "concrete" statistics concerning issues facing older residents;
- Explore diversity among older adults (e.g., by neighborhood, language, ethnicity); and
- Identify assets that could be mobilized for future action as part of the initiative.

As one participant stated at the beginning of the planning phase, "We're looking to find out what our current needs are, what our current assets are, what assets are potentially not being used, to really get a good picture on how we can help our residents age in place."

Participants especially emphasized their aim to develop an understanding of aging based on data from their own specific localities—noting that existing data sources, which were more regionally based, did not offer sufficient information. For example, one participant commented, "There are places (in our county) where there's more poverty, drug usage, and just different health concerns. So in terms of using outside data, it doesn't really reflect us. We really need our own data."

Greater Engagement of Local Stakeholders around Aging

Participants also identified the greater engagement of diverse community stakeholders around aging as another goal of the AFCI planning period. Engaged stakeholders were described as people and organizations with not just mere awareness of the AFCI, but who actively were monitoring the initiative's development as part of their own involvement—current or prospective. For example, as one participant said reflecting back on the planning period, "There's a mindfulness that has come out of the project. People are now coming to us with ideas and hope that we might be able to address these problems. They're really thinking."

Many participants described how they systematically worked toward engaging stakeholders from a wide range of organizations, as listed on Table 4 (p. 8). In addition to cultivating relationships with diverse stakeholders, several of the participants described the importance of engaging organizations that are well known and respected throughout the community, that are poised for action around aging in the community, and that are in positions of influence concerning resource allocation within their own organizations or the community more broadly.

Participants also identified the importance of engaging stakeholders who might not immediately identify aging as a central concern, but whose work could be enhanced

Leaders in Teaneck, NJ, participate in a ribbon-cutting ceremony for a newly constructed federally subsidized senior housing community, which opened in the spring of 2016. Housing is one domain that AFCI leaders are continuing to explore for age-friendly action.

through the AFCI. In fact, many participants reflected that a primary purpose of the planning phase was to help local professionals to see the relevance of the initiative for their existing areas of concerns, as opposed to viewing it as one additional thing to attend to. For example, a participant explained that her municipality was redeveloping land around a public transportation terminal as part of a neighborhood revitalization project. The redevelopment leaders were initially focused on the younger, more working-age population; however, as part of the planning phase, AFCI leaders were able to raise awareness of the project's potential to attract and benefit retirees as well.

Participants described the importance of not only cultivating relationships between the lead organization and stakeholder organizations, but also of strengthening connections among the stakeholders themselves to create momentum for community-level change. As one participant commented, "As a result of the grant, there is sort of a new synergy. So we may have had individual connections, but you get people together, and it breeds a new kind of energy."

While participants largely described their aim to engage professionals, many also discussed their efforts to engage older residents themselves in the efforts of the AFCI. Specifically, AFCI lead organizations aimed to make older residents aware of the initiative, how to become involved,

A student intern prepares a presentation on older adults in Elizabeth, NJ. The purpose of the presentation was to both educate and engage community members in the AFCI's planning phase.

and the value of their participation. For example, one AFCI leader described his initiative's work to communicate to older adults "that their voice matters, that we want to hear from them…to see the potential change, to feel more aware of a role in community and that they could have strong impact."

Expectations for Longer-Term Action

Participants described how the two primary goals of the planning phase—better understanding of aging in the community, as well as greater engagement of local stakeholders around aging—related to two inter-related, longer-term goals and objectives: (a) to formulate robust plans for age-friendly action, and (b) to strengthen advocacy efforts for additional resources on behalf of aging and the AFCI.

Table 4. Stakeholders Targeted for Engagement According to AFCI Leaders	
Category	**Examples**
Faith-Based Organizations	Churches; synagogues; other religious centers
Housing Providers	Affordable senior housing operators; property managers of federally subsidized senior housing
Local Businesses	Chambers of Commerce; businesses located in central retail districts
Locally Elected Officials	Mayors; council members
Municipal Departments	Libraries; senior centers; recreation divisions; emergency responders; town administrators; planning and transportation divisions
Older Adult Clubs, Advocacy Groups, and Other Voluntary Associations	Municipally-organized senior advisory committees; grassroots organizations for older adults; local Rotary chapters
Private Community-Based Service Organizations	Social service organizations; hospitals; food pantries

AFCI project coordinators, lead organization staff, consultants, organizational partners, locally elected officials, interns, volunteers, and funders pose for a photograph after a grantee meeting.

AFCI leaders consistently described the value of having local data to help guide the formulation of their age-friendly action plans. They planned to use the data to identify priority areas for action—those issues that older residents and other stakeholders viewed as most critical for improving aging in the community. Beyond this purpose, however, AFCI leaders also described the importance of data to help garner additional resources to support these very actions. For example, participants discussed the potential of the data to help generate additional grant funding. As one participant commented, "When you apply for grants, you can show this whole process. We have this data. It makes a much more compelling grant application than just saying we think we need it."

They further described the importance of data for local advocacy around aging, anticipating the use of the data to more deeply engage local officials. As one participant stated, "To be able to go to (the municipal government) and say, 'It's not what I feel or what (another organization) thinks. We did a survey of seniors representative of the community; these are the top issues being raised.' You can't argue with that."

In addition to the local government, participants also described the utility of data to motivate financial and in-kind contributions from other local organizations. For example, one participant described how survey findings regarding the accessibility of storefronts in a downtown district could motivate local business owners to assess their age friendliness and make improvements.

Despite the great value that participants placed on data, many reflected on the idea that having data alone is unlikely to lead to effective and sustainable age-friendly action. Participants described the critical importance of having such data in the context of actively engaged stakeholders working together to advance the AFCI and its goals. Strengthening connections across stakeholders was viewed as especially important for the AFCIs' future goals and objectives, including both advocacy and implementing age-friendly actions. In fact, many participants stated their expectation that it would be the work of the community stakeholders—as a collective—to advance the AFCIs' longer-term activities and objectives. As one participant commented, "We could have all the data in the world, but we need people who could help make things happen."

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HOW: What Are the Primary Activities of AFCIs in the Early Planning Phase?

AFCI leaders discussed several key activities as part of the planning phase. This section describes these activities according to three categories: (a) assessing the community, (b) meeting and communicating with stakeholders, and (c) facilitating communitywide communications. It then presents participants' perspectives on these activities' overlapping purposes in working toward both goals described above (i.e., better understanding aging in the community and greater engagement of local stakeholders around aging).

Assessing the Community

Although all of the nine AFCIs in this study used multiple methods to develop a better understanding of aging in their communities, the focal activity for nearly all of them was conducting a new communitywide survey of older adults. AFCI leaders described the various aspects of planning such a survey, as listed on Table 5.

Developing the survey questionnaire was described as a particularly important and time-intensive aspect of the AFCI planning phase. Many participants reported reviewing existing questionnaires—such as from national organizations, other grantees, and their consultants—and needing to extensively modify the instruments for their own communities. The goal of this work was to include questions about a range of areas with potential relevance to older adults, while also ensuring that the survey was concise enough such that people would participate in it. AFCI leaders also described their efforts to make the questions relevant for their specific communities, such as by referring to the names of particular resources in their own community (e.g., the name of the local press). Moreover, in many cases, the design of the survey questionnaire was a collaborative process and required systematically gathering input from diverse community stakeholders.

Conducting focus groups constituted another common activity to gather data. Focus group data were described as important for understanding in greater depth why particular issues mattered for older adults and for exploring potential solutions. Many of the initiatives

strategically selected subgroups of older residents with whom to conduct focus groups. For example, some initiatives led focus groups through local organizations serving under-represented subgroups of older adults. Others conducted focus groups with older adults residing in different geographic areas of their communities to explore how issues and opportunities potentially differ by neighborhood setting.

Many of the communities also conducted extensive one-on-one interviews and focus groups with professional stakeholders. Similar to focus groups, participants valued interviews with professionals for providing insights regarding more vulnerable older adults, who were perceived as less likely to participate in surveys, such as those with cognitive impairment or complex medical needs. Furthermore, interviews with stakeholders were described as especially valuable for exploring possible actions to address likely priority areas. For example, one leader described how many older adults commented in the communitywide survey on wanting a mini-bus to loop through town; an interview with a key stakeholder from the Chamber of Commerce reported that community leaders had previously looked into this possibility and that it was deemed to be prohibitively expensive.

Table 5. Tasks Involved in Planning a Communitywide Survey According to AFCI Leaders

- Writing and designing a survey questionnaire, incorporating information from existing instruments

- Establishing an age cut-off for survey respondents

- Developing and implementing a plan for collecting a sufficient number of responses across diverse subgroups of older residents

- Creating a system to organize and analyze survey responses

- Creating a plan to disseminate findings and to provide outlets for discussing their meaning

- Managing community member's expectations around what might come from the data (e.g., that the community might not have the resources to act on every area of concern that the survey identifies)

A municipal shuttle in Ridgewood, NJ, helps older residents in need of transportation assistance to attend a presentation at the town hall to learn more about results from the AFCI communitywide assessment.

Only one of the nine communities used formal mapping as an assessment activity in the early planning phase. This AFCI represented one of the more densely populated communities, which was described as having distinct neighborhoods with likely different issues and opportunities facing older residents. This community mapped concentrations of older adults by key characteristics (e.g., residence in single-family versus multi-family homes) to help better define the key issues within neighborhoods to inform their action plans.

Meeting and Communicating with Stakeholders

In addition to data-gathering activities, participants described meeting and communicating with stakeholders as another primary category of activity in the early planning phase. AFCI leaders referenced many one-on-one and group meetings that they initiated, facilitated, or attended throughout the planning period.

Participants generally described the group meetings that they initiated on their AFCIs' behalf, although in some cases AFCI leaders attended meetings already organized by other groups. For example, leaders in one community described how early in the planning phase, the mayor put the AFCI "on the agenda" for a regularly scheduled staff meeting with municipal department leaders. They described the municipal leaders' body language at the beginning of the meeting as, "What do they want from me?" However, as the AFCI project leaders explained their purpose as getting their input and partnering with them in the future, "the dynamics of the meeting changed dramatically…Once they started talking and being listened to, they were fine." This meeting helped to set a

positive tone for future meetings between the AFCI project leaders and municipal employees.

Group meetings with diverse stakeholders were perceived to be especially important for developing relationships beyond the lead organization and partnering organizations alone, serving to create independent connections across the community groups. For example, one participant described the importance of the town manager attending an early meeting among stakeholders: "He could see participants connecting one to another with this project and as a whole unit (seeing) how important it is to them and how important it is to the constituents they represent." Another participant described the value of group meetings for helping professionals to better understand systemic issues in the community and the importance of coordinated action as a result. For example, one participant commented that before the AFCI planning phase, stakeholders "were not talking to one another. They're just kind of managing their individual (groups). They're taking care of their own…just not doing it together." He expressed his hope that with continued group meetings, stakeholders would identify concrete opportunities for collaboration.

Several of the nine initiatives created and convened a formal partners group on behalf of their initiative at the very beginning of the planning phase. Leaders referred to these groups with various names, including "steering committee," "advisory group," and "coalition". These groups typically included both professional stakeholders representing local organizations, as well as older adult resident volunteers. The partner groups were described as convening with some regularity throughout the planning phase, and the foci of the meetings typically addressed the particular needs of the initiative at that time. For example, one AFCI leader described how group meetings early in the planning period focused on designing the AFCI survey questionnaire, whereas at later meetings, the group was planning to discuss the results from the community assessments and potential directions for action.

The initiatives without a formal partners group maintained a more informal roster of partners with whom they would regularly share initiative updates, whom they could call upon with specific requests, and with whom they would meet on occasion. However, by the second interview, many of these initiatives were actively strategizing on how to formalize an AFCI partners group,

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using the results of their community assessments to structure task forces around particular issues and to identify specific people to invite to join.

In addition to group meetings, AFCI leaders described their work at conducting one-on-one meetings with key stakeholders. In some cases, these meetings were structured as formal interviews. In other cases, these meetings were more informal networking meetings, whereby the project coordinator would introduce the the AFCI, learn more about the work and priorities of the stakeholder organization, and ask the organization for its support and involvement with the AFCI. Participants described one-on-one meetings as especially important for engaging organizations with whom they had little prior contact. As one participant reflected, "It seems that (one-on-one meetings) is the only way to reach them, to go to where they are at rather than have them come."

In addition to designated meeting times, whether individually or in a group, the AFCI lead organizations described how they regularly communicated with partners via email and telephone. This correspondence was viewed important for not only exchanging information, but also for keeping partners engaged. For example, one participant reported sending periodic emails to municipal department heads to continue to engage them in the concept of "age-friendly," such as by sharing materials from the World Health Organization and how "a lot of places in the U.S. are starting to catch on."

Facilitating Communitywide Communications

Participants described communitywide communications as another category of activity during the early AFCI planning phase. These activities went beyond communicating with specific persons or groups (as described in the subsection above), and instead focused on broadcasting information across the entire community.

As part of this work, engaging the local press became a focus of many AFCIs' strategic communications. For some initiatives, press releases were developed immediately upon receiving the planning grant. For other initiatives, project leaders developed a press release over a longer period of time. For example, they waited to arrange a photo shoot with the mayor or until a link to the web version of the communitywide survey became available. Many participants described actively reaching out to local reporters to facilitate press coverage of their initiatives.

Another common activity for communitywide communications was placing information about the AFCI on websites and through Facebook. Participants described the importance of web-based communications to reach older residents on the internet, as well as their younger family members, neighbors, and professional stakeholders. Many participants at the initial interview stated their plans to include information about the initiative on existing websites and Facebook pages, such as those of their own organization, the municipality, and other partnering organizations. An exception was one community that developed a standalone website for the initiative early in the planning phase, citing the advantages of having more direct control over editing and updating the content than having to work through other organizations. By the time of the second interview, several other communities stated that they were beginning to create an independent website for their initiatives as well. As one community leader stated, "Information dissemination is going to be a big part of this, and we need a website to do that."

Organizing community forums and presentations was another vehicle for communitywide communications. These events typically took place later in the planning phase after the AFCIs had generated initial findings from their community assessments. They were generally advertised to the entire community, although in several cases AFCI leaders reported that the attendees were

Three of the members of the leadership team for the AFCI in Westwood, NJ, include the mayor (left), the executive director of a local nonprofit (center), and an elected council member (right).

Facilitated by a student intern, participants convene in a small group to brainstorm actions around the priority areas that emerged from Age-Friendly Englewood's community survey.

Activities as Having Multiple Purposes

Participants collectively described how each of the three categories of activities (assessing the community; meeting and communicating with stakeholders; and facilitating communitywide communication) worked toward both goals of the AFCI planning phase (enhanced understanding of aging in the community and greater engagement of local stakeholders around aging). In other words, an activity that might at first have appeared to be solely for better understanding aging in the community also fulfilled the purpose of engaging stakeholders around aging, and vice-versa.

For example, participants often described that data collection encounters were valuable not only for the information gathered, but also because of the interpersonal exchanges created in the process. Some participants, in fact, described how the very process of completing the communitywide survey—collaboratively seeing it through from its planning to its results alongside community partners—was an "early win" and a concrete example of success that was energizing to themselves, older residents, and other stakeholders alike. Participants described the perceived value of sharing results with older adults in particular, communicating that "something did happen with this and we do have some information that came out of it that we want to move forward on."

mostly the professional stakeholders and older adults who had participated in surveys or focus groups. A primary purpose of these forums was to provide information about the AFCI, as well as what AFCI leaders were learning about aging in the community. As one participant reflected, "It was an opportunity to bring everybody more up to speed on what they may have learned on the website or newspaper articles as to where we're at (and to provide) sort of an overview of the findings."

Across these communications activities, AFCI leaders identified crafting the appropriate language for the initiative as part of the work of the planning phase. For example, one participant explained how the library posted information about the initiative on its Facebook site using "the phrase 'seniors,' and somebody shot right back, 'That is not the right term.'" Initiatives varied on what they called themselves and how they reached decisions about terminology. One community, for example, used the term "Age-Friendly" in its title from the beginning, adopting the language from the funder's planning grant application, and reported that "nobody ever suggested that we change it so it just stayed that way." Project leaders from another community, in contrast, actively deliberated on what to call the initiative—deciding among terms such as "age-friendly," "lifelong," and "livable." These participants stated their hope that the findings from the community assessments would help them to settle upon a term later in the planning phase.

Participants also reflected on how efforts to disseminate the survey questionnaires provided platforms for sharing information about the AFCI to the broader community.

Leaders of the age-friendly community initiative in Plainfield, NJ, pose for a picture after a grantee meeting.

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For example, one community used funds from the planning grant to do a municipal wide postcard mailing that directed people to the online survey, while also communicating information about the broader aims of the AFCI. Participants further described how the focus groups and one-on-one interviews were important for gauging potential partners' level of interest and contributions as volunteers. For example, several participants described how focus groups were useful for recruiting older adults to serve on their AFCI partner groups. Similarly, one-on-one interviews with professional stakeholders gave AFCI leaders the occasion to get on the agendas of busy professionals, to introduce themselves and the AFCI, and to learn about ways in which they could potentially benefit from—and contribute to—future AFCI activities.

Participants also described how the focus groups themselves led to participants sharing information in immediately helpful ways. For example, at one of the AFCI's focus groups, older adults learned that a local urgent care center accepted Medicare. At another focus group, professionals learned that the local library had just started an older adult oral history program.

Participants further described the value of the data to guide strategies for engaging stakeholders in the long-term. For example, one participant reflected how early in the planning phase the lead organization's conversations with some of the municipal department heads led to a general response such as, "That is great. That is fantastic. Good job. I am sending so and so." However, the participant expressed her hope that once they have the data from their community assessments, the AFCI leaders can more forcefully demonstrate that municipal departmental responsibilities "have come up as a major issue in the community, and we are creating a coalition, and we really feel strongly that someone from your team at the leadership level should be part of that. Then you have a different conversation."

On the flipside, meetings and communications with stakeholders also were used for generating data that contributed to better understanding aging in the community. For example, several participants described how a key function of the partners groups was to provide insights about the community to help guide assessment decisions, such as which organizations to prioritize for one-on-one interviews, how to frame survey questions in locally responsive ways, and how to disseminate survey questionnaires to diverse subgroups of older residents.

Community forums provide a final example of how activities in the AFCI planning phase had multiple purposes. The text box below demonstrates this idea.

WHO: Who are the key individuals and organizations involved in AFCIs' early planning phase?

This final section addresses the research study's third question regarding the key individuals and organization involved in AFCIs' early planning phase. Findings with respect to this question are organized according to participants' descriptions of the following parties: lead organizations and project coordinators; consultants; locally elected officials; organizational partners; individual volunteers and interns; and the funders and leaders from other AFCIs.

Community Forums as an Example of a Planning Phase Activity with Multiple Purposes

Shortly after analyzing data from a community-wide survey, many AFCI leaders hosted presentations to communicate findings to municipal officials, professional stakeholders, and residents. The purpose of these presentations was to both present data regarding older adults' perceptions of the community, as well as to gather new insights, strengthen key relationships, and create new ones. For example, the presentations afforded an opportunity for project coordinators to reach out to key stakeholders in advance, encouraging them to attend the event. They also allowed an opportunity for coordinators to follow up with stakeholders after the presentation. Also, at many of the presentations, attendees were given worksheets to solicit their feedback on the findings and to collect their contact information as a way to become more involved. Local newspaper reporters also were invited to the forums, which in some cases led to news articles that shared information about the initiative to the broader community.

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Lead Organizations and Project Coordinators

Participants identified ways in which the AFCI project coordinators, along with other staff within the lead organizations, oversaw and conducted much of the work in the planning phase. Participants generally described the role of the project coordinators as completing time critical tasks; initiating, supporting, and managing the efforts of other individuals and organizations; filling in gaps when other parties were unavailable to assist; and ensuring that people remained on task with their designated responsibilities.

For example, a project coordinator within one community described her role in supporting the organizational partners to collect survey responses from older adults: "I would send an email just updating (the partners) as the survey was going on: 'Thank you. We are up to this many surveys. Is there anything I can do? Do you need more paper? Do you need me to reach anybody?' It is just communicating."

AFCI leaders described the value of their own professional backgrounds for the work of the planning phase. For example, several project coordinators reflected on how their training in public health was well suited for the assessment component of the initiative, and others reflected on how their backgrounds in social work gave them sensitivity to the range of environmental and individual issues related to aging in the community. Some project leaders also described their own efforts to teach themselves new skills during the planning phase, such as how to develop a logic model.

In addition to this human capital, participants described ways in which they drew upon their existing social relationships within the community. Upper-level managers, in particular, described their long histories of working within the community and how their background deepened and accelerated others' involvement. As one participant said, "We (the lead organization) are known. So the access was just easier. Everyone has been very welcoming because we do a lot of work in the community."

Participants generally reflected on how the activities in the planning phase took more time for the project coordinator and lead agency staff than initially anticipated. As one participant stated, "Even typing up these stakeholder interviews is taking up more time than I thought it would. I'm trying to send them back to the people to make sure they're satisfied because it's going to go in the record of the report and be read by the whole team or anyone else that wants to. So I want them to be comfortable."

Nevertheless, when participants were asked if additional grant money would have been helpful to support more of the project coordinator's time, many people hesitated. Some participants viewed their "extra" time in the planning phase as an investment for facilitating the future work of the initiative. For example, one participant described his efforts to initiate meetings with more people than they had originally anticipated so as not to create "missed opportunities, which can put us behind in the long run." Other participants also stated their expectation that the project coordinator's work would become even more time intensive during the initiative's implementation stage, at which point they would budget in more time for the coordinator. Moreover, other participants described that if additional planning grant money would have been available, they would have used it to hire additional outside professional services, such as greater involvement of research consultants.

Consultants

Eight of the nine initiatives used at least a portion of their planning grants to contract with an outside organization to provide consulting services, with some using the majority of the grant funding for this purpose. Four of the initiatives contracted with local institutions of higher education. Two others hired consultants from locally private firms, one hired a national consultant, and another contracted with a regionally based nonprofit. Participants described that they selected consultants based on their expertise, as well as their price, availability, and prior experiences working together.

For seven of the nine initiatives, the consultants were contracted mainly to provide research services—an area that AFCI leaders largely viewed as complementary skills to their own. As one participant stated, "We are a social services agency. So while we run small needs assessments or look at what's out in the community, we don't necessarily do extensive research." The consultants were typically involved in multiple components of the

assessment, including designing the survey questionnaire, conducting focus groups, analyzing data, and writing summary reports. However, across all of the initiatives, none of the consultants were directly involved with administering the survey questionnaires to older adult residents. This was the work of the lead organization in partnership with organizational partners, volunteers, and interns. Participants described the consultant's lack of involvement in this domain as a result of budget limitations, as well as the perception that consultants did not have the presence in the community to effectively engage the participation of local organizations and individuals.

The two initiatives that did not hire consultants for research did not, in part, because of budgetary constraints, as well as their initiatives' needs. In one case, the initiative hired a consultant with a national reputation on age-friendly communities to help engage key stakeholders at the very beginning and end of the planning grant period. The consultant's role in this case was to inspire and sustain excitement around the initiative, for example, by sharing examples of age-friendly successes in other parts of the country. The other initiative without a hired research consultant was in one of the smaller municipal settings. The initiative leaders chose one-on-one interviews and focus groups as their primary modes of data collection to facilitate "open-ended discussion," which was conducted entirely by the project coordinator.

Locally Elected Officials

All participants reflected on the involvement of locally elected officials in the planning phase. Most typically, participants focused on the role of the mayor, and in some cases, elected council members as well. In many instances, participants described local officials as leaders who had reputations for being attuned to older adults before the AFCI planning phase began. Several mayors signed letters of support or made public proclamations as part of the planning grant application, and in one case, project leaders pursued the planning grant at the mayor's request. Mayors and council members were described as contributing to the early planning phase in a variety of ways, as listed in Table 6 below.

In some cases, AFCI leaders strategically aligned the initiative closely with the mayor's office during the early planning phase. For example, in one community, participants described the importance of including the mayor on the letter introducing the communitywide survey, which was perceived as giving the initiative greater prestige and credibility among residents. In other cases, AFCI leaders somewhat distanced the initiative from elected officials, especially in cases where the elected

Table 6. The Role of Locally Elected Officials in the Early Planning Phase According to AFCI Leaders

- Helping to connect the AFCI lead organization to key stakeholders in the community, especially municipal departments
- Co-hosting or attending community gatherings to help engage older adults in planning phase activities
- Designating a staff member as a liaison to the initiative, which provided project leaders a point of contact on the mayor's behalf
- Supporting communitywide communications about the initiative, including collaborating on press releases and other promotional materials

Table 7. The Role of Organizational Partners in the Early Planning Phase According to AFCI Leaders

- Distributing survey questionnaires to older adults and encouraging people to complete them
- Hosting data collection events, whereby groups of older people would be asked to complete surveys on site, potentially in conjunction with light refreshments and other programming
- Recruiting older individuals and other organizations to participate in focus groups and interviews
- Attending meetings to provide advice on key initiative decisions, such as questions to include on the survey, strategies for reaching under-represented subgroups of older residents, and how to engage local officials
- Cultivating relationships with other community organizations on the lead organization's behalf, especially for liaising with individuals and organizations with whom the lead organization had little prior contact

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AFCI leaders across northern New Jersey meet at the Jewish Federation of Greater MetroWest NJ in Whippany, NJ, to share information with each other and to learn from regional speakers. These events took place approximately every other month.

officials were embroiled in divisive political issues. For example, one participant expressed her aim as ensuring that elected officials do not "derail the coalition or claim it as their own project when it is clearly meant to be a project of the whole community."

Organizational Partners

Participants described a variety of organizations that contributed to the initiatives. In most cases, these organizations were municipal departments and nonprofits located within the community. Other examples included librarians, senior center directors, housing managers, social service providers, faith-based leaders, and chambers of commerce members.

Table 7 (p. 16) lists the key functions of organizational partners in the early planning phase, according to the participants. Many of the activities involved assisting with collecting data, especially in terms of liaising with older residents and facilitating their participation in surveys, interviews, and focus groups.

Participants described that while some organizations' participation was limited in the planning phase, they expected them to become more deeply involved in subsequent phases, especially after finalizing their age-friendly action plans. For example, one participant reflected on the involvement of municipal departments on a partners' group: "In a perfect world, I would have a representative from every local government department. I think as projects come about, we will. I don't think that they are unwilling to help. I think the planning phase was just a little bit unspecified and very vague, and now that we have specific projects, we know that we can ask this person to help. So let's say we need DPW (Department of Public Works) help for walkability, or planning and zoning. Okay, we can ask this person."

Individual Volunteers and Interns

Most of the initiatives reported having the assistance of individual volunteers early in the planning phase, and several of the initiatives also reported the involvement of interns from their own organization or others. Some volunteers came to the AFCI through partnering organizations (e.g., a volunteer from a local senior center), whereas other individuals became involved as volunteers with the AFCI through the lead organization directly.

Volunteers and interns were largely described as providing additional human power, especially in terms of assisting with assessment activities. For example, a retired statistician in one community contacted the project coordinator to help design the questionnaire. Other volunteers delivered copies of the questionnaire to friends, neighbors, and community members through their own social networks. University interns also were involved by translating the survey questionnaires into languages other than English, helping to prepare the survey questionnaire,

assisting with data entry and analysis, and assisting individuals with completing the survey.

Despite the great value that participants placed on volunteer and interns' contributions during the planning phase, many expressed their concern if the AFCI planning phase were to be completely volunteer run. Participants stated that volunteers might lack relevant skills (e.g., in strategic planning and community outreach), have limited availability of time, and would not be as accountable to complete critical tasks on time. The need for professional staff is reflected in the following quote: "When you have a grant, it makes resources available to bring in a professional—to do the survey and just to spearhead and organize the whole thing. And then it also gives structures and deadlines. With the best intentions, always something else comes up, and you keep talking about it, and three years later, you haven't actually done anything but talked about a lot of good ideas."

Funders and Leaders of Other AFCIs

Participants further described the importance of funders and leaders from other AFCIs throughout the planning phase. Participants were especially grateful to the program officers from the local philanthropies for not merely facilitating the planning grant's financial support, but also actively assisting them during the planning phase. For example, participants found value in having the program officers serve as an additional source for ideas and trouble-shooting. Participants also described their appreciation for the program officers' efforts to actively share relevant information with them, such as by sharing web-based resource, sending pertinent information via email, directly connecting them with national experts in particular areas, and helping them find answers to questions. As one participant said, "If we had to go and find all this stuff about the area, we never would have known about (some of those resources)."

In addition to information sharing, participants also identified the importance of the funders as age-friendly champions, which helped to get the buy-in of community stakeholders. For example, one participant described how the program officer met directly with key stakeholders early in the planning period, generating excitement for the concept of age-friendly as part of a larger movement. Another participant described how having a foundation's support gave their efforts more credibility, generating interest from new stakeholders as well as word-of-mouth

comments from community members such as, "Wow. This is a big deal now."

Participants also expressed their appreciation for the funders' role in connecting them with the other AFCI leaders across northern New Jersey and beyond. Throughout the eight-month study period, the funders organized five all-grantee meetings (in addition to occasional meetings among their own individual grantees), whereby representatives from the initiatives would convene to learn from, and with, each other. Grantees described the value of hearing directly about the work of their peers, which generated ideas and helped them to reflect on their own activities. They also found it helpful to receive materials from other communities, such as survey questionnaires and promotional materials, which gave them a foundation for developing their own.

Participants also valued when AFCI leaders from outside of the grantee network presented at these meetings. Participants emphasized the value of learning from initiatives that were beyond the planning phase for the purpose of "seeing what's possible." In general, participants found these encounters not only helpful for information sharing, but also for sustaining their own energy toward the work. As one participant reflected, "I think when we got together the few times, they were perfect times when we needed to pick this up and get a little more excitement. So that was key."

Conclusion

This report provides an overview of the planning phase for nine newly developing AFCIs covering 12 municipalities in northern New Jersey from January through August of 2016. Based on interviews with initiative leaders, results indicated enhanced understanding of aging in the community and more engaged stakeholders around aging as the two primary goals of the early planning phase (the *why*). Project leaders gathered data, conducted meetings, communicated with stakeholders, and facilitated communitywide communications to work toward these goals (the *how*). In doing so, they leveraged the skills, knowledge, and resources of their own lead organizations, outside consultants, elected officials, organizational partners, volunteers, interns, funders, and leaders of other AFCIs (the *who*). Figure 3 provides a visual summary and integration of these findings.

Overall, results of this study demonstrate that community assessment remains an important component of the early planning phase. However, initiative leaders emphasized the equal importance of broader community engagement. Some of this engagement took place through traditional outreach activities, such as community presentations and one-on-one meetings with stakeholders. Much of this work, however, was embedded within assessment activities. For example, AFCI lead leaders described how partnerships were strengthened when community organizations assisted with distributing survey questionnaires. Focus groups with older adults created opportunities to recruit volunteers. Interviews with stakeholders provided a platform for engaging community leaders in longer-term conversations about collectively improving the community's age-friendliness. In short, findings suggest that community assessment and community engagement during AFCIs' early planning phases can be considered two sides of the same coin.

Furthermore, this study indicates how AFCIs' early planning activities draw upon resources beyond the financial support from planning grants alone. Results suggest conceptualizing planning grants as dollars that catalyze the knowledge, skill, and time of various parties. This includes the lead organization and organizational partners, as well as elected officials, consultants, volunteers, interns, staff of funding organizations, and other AFCI leaders. These findings suggest that planning grants alone are unlikely to ensure the success of AFCIs. Instead, planning grants can be viewed as giving community leaders the opportunity, resources, and tools to more deliberately and systematically grow and activate latent resources that already exist within a community.

More research is necessary to understand how the goals, activities, and resources of the early AFCI planning phase lead to age-friendly actions. For example, because of the timing of the second interview for this study (at which point most participants were just beginning to receive the results of their communitywide assessments), this study was unable to address later activities, such as how AFCI leaders potentially used the assets developed in the planning phase (e.g., data and relationships) to engage in action planning. Nevertheless, this study provides a deep understanding of the work involved during AFCIs' early planning phase. As age-friendly leaders in the United States have observed, "Creating better places to grow up and grow old can be difficult, complex work."[12] Research findings, such as those presented in this report, can help to clarify some of this complexity and thereby enhance the impact and reach of AFCIs—past, present, and future.

Figure 2. An Integrative Framework on the Who, How, and Why of Age-Friendly Community Initiatives in the Early Planning Phase
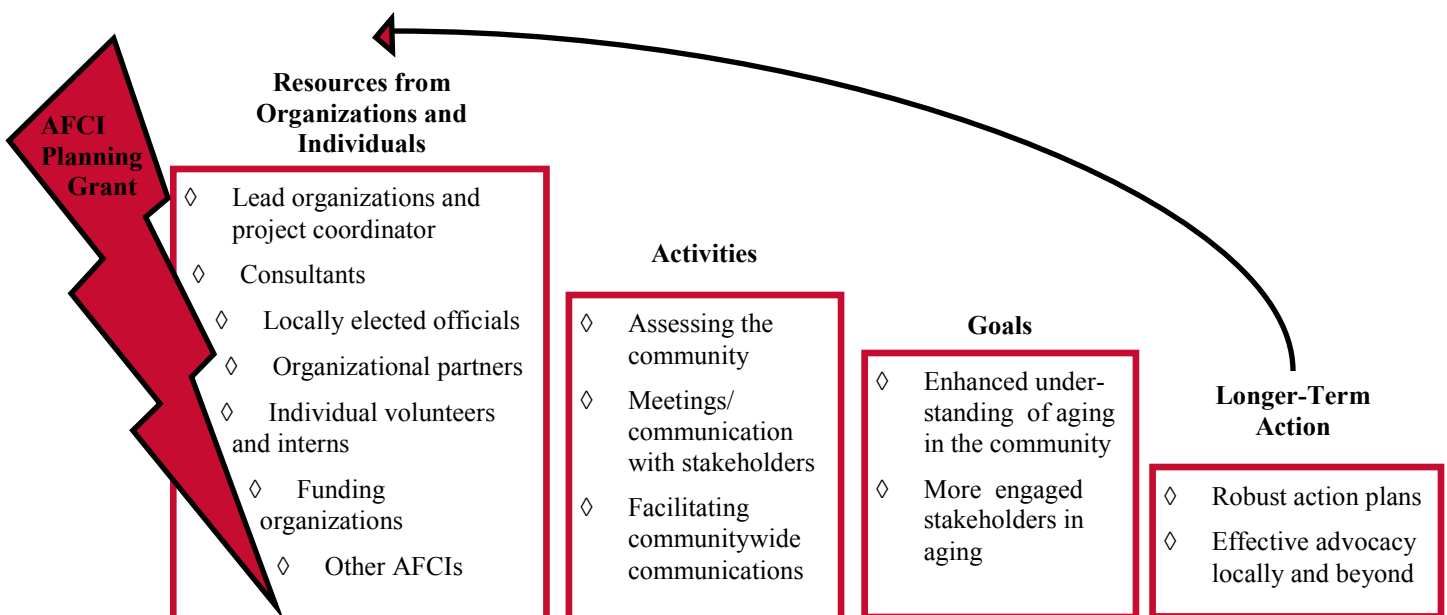
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