SOCIAL ISOLATION of Seniors

Volume II

Ideas Exchange Event Toolkit

Participating Governments

- Government of Alberta
- Government of British Columbia
- Government of Manitoba
- Government of New Brunswick
- Government of Newfoundland and Labrador
- Government of Northwest Territories
- Government of Nova Scotia
- Government of Nunavut
- Government of Ontario
- Government of Prince Edward Island
- Government of Québec
- Government of Saskatchewan
- Government of Yukon
- Government of Canada

Acknowledgements

The F/P/T Working Group on Social Isolation and Social Innovation would like to thank Dr. Penny MacCourt for leading the development of this product. They would also like to thank a panel of reviewers including Vickie Cammack, Charlotte McEwen and Ryan Conway from Innoweave, Dr. Norah Keating, Kahir Lalji, Lori McLeod, the National Seniors Council of Canada, and Dr. Gail Wideman. The contributions from the many participants of the pilot ideas exchange events were invaluable in creating this Toolkit.

Prepared by Dr. Penny MacCourt for the Federal, Provincial, and Territorial (F/P/T) Forum of Ministers Responsible for Seniors. The views expressed in this product may not reflect the official position of any particular jurisdiction.

The Forum is an intergovernmental body established to share information, discuss new and emerging issues related to seniors, and work collaboratively on key projects.

Québec contributes to the Federal/Provincial/Territorial Seniors Forum by sharing expertise, information and best practices. However, it does not subscribe to, or take part in, integrated federal, provincial, and territorial approaches to seniors. The Government of Québec intends to fully assume its responsibilities for seniors in Québec.

In Alberta, to access an electronic version of this document or to order copies please visit the *Reducing Social Isolation for Seniors* page at www.seniors-housing.alberta.ca.

Other information about supports and services for seniors in Alberta is also available on the site.

TABLE OF CONTENTS

Introduction

The previous document, *Social Isolation of Seniors: Volume I – Understanding the Issue and Finding Solutions,* gives an overview of social isolation among seniors. It identifies the core principles of social innovation and how they can be used to address social isolation, and also gives examples of socially innovative approaches in Canadian communities.

To support people and organizations who work towards or would like to become involved in preventing the social inclusion of seniors, the Forum of Federal/Provincial/Territorial Ministers Responsible for Seniors has developed this second volume—*Ideas Exchange Event Toolkit.*

Purpose

This toolkit is meant to help people and organizations host effective meetings to exchange ideas and respond to the social isolation of seniors in their communities. It contains tools, templates and support resources for hosting an **ideas exchange event.**

Ideas exchange events:

- help people and groups to share knowledge about the social isolation of seniors;
- build and strengthen relationships in communities; and
- create opportunities for working together to address the social isolation of seniors in the community.

Ideas Exchange Events

Working together, people, organizations, businesses, educational institutions, communities and governments can help to prevent social isolation among seniors. Seniors or any interested group wanting to reduce social isolation in their community can lead a discussion to find socially innovative solutions. Participants do not need to have experience with social isolation or social innovation.

A planned event can bring together organizations from different sectors to work together on community-wide solutions. Events can vary in length depending on community readiness and commitment to participate. The toolkit suggests three possible formats: a partial-day event, a one-day event and a two-day event. Partial-day and one-day events are generally stand-alone events. A two-day event usually builds on a one-day event, ideally with a time lapse in between, for thinking and homework. Appendix A contains guidelines for facilitators for each of the three formats.

Events can be relatively large scale (e.g. in a conference venue with 30–40 participants) or small scale (e.g. in an office with 5–10 people). Each has its advantages and disadvantages. They can be tailored to the group size, objective, time and resources available. Different considerations will be necessary depending on the size of the event. For example, a smaller event can have more intimate and focused conversation, while a larger event can benefit from the greater diversity of experience that more participants can offer.

The tools and techniques for hosting an ideas-exchange event (Appendix B) help start discussions and planning for possible solutions to social isolation. A checklist for planning an event (Appendix C) outlines tasks for planning an event. This toolkit also includes a sample invitation to an event (Appendix D), basic presentation slides (Appendix E), an event feedback form (Appendix F), an event report template with guidelines (Appendix G) and a list of other resources (Appendix H).

Finally, the toolkit supports event facilitators with a range of experience and knowledge. A facilitator with experience in managing group processes ensures that the event is collaborative, inclusive and productive. However, facilitators of ideas-exchange events can also be interested community members with no professional facilitation experience.

The best ideas from an ideas exchange event can be explored and adapted at meetings that follow. It usually takes time for participants to agree. Follow-up sessions give participants time to explore solutions in detail and think about how to put them into practice.

Examples of Event Formats

Partial-Day Ideas Exchange Event

Facilitators can find detailed instructions for the **partial-day event** in Appendix A.

Objective

Participants share an understanding of social isolation among seniors and of how social innovation can address social isolation in their community.

Materials

Copies of case study, flip charts, **feedback forms** (Appendix F).

Tools

1. **PowerPoint Presentation** (Appendix E)
2. **Case Study Scenario** (Appendix A)
3. **Activity 1** or **Activity 2** (Appendix A)
4. "**1-2-4-All**" (Appendix B)

Suggested agenda

8:30 a.m. – 9:00 a.m.
Welcome and opening remarks

9:00 a.m. – 10:00 a.m.
Presentation on social isolation and social innovation

- Present and discuss an example that illustrates a socially innovative solution to seniors' social isolation

10:00 a.m. – 11:00 a.m.
Activity 1 **or** Activity 2

- **Activity 1: Raising Awareness of Seniors Social Isolation**
  - Present case study scenario
  - Present risk factors that can lead to social isolation and protective factors that can help prevent social isolation
  - Breakout groups discuss methods of reducing and preventing social isolation with the risk factors and protective factors in mind
- **Activity 2: Socially Innovative Approaches to Social Isolation**
  - Present case study scenario
  - Present principles of social innovation
  - Breakout groups discuss how principles of social innovation can be applied to address social isolation

11:00 a.m. – 11:30 a.m.
Activity review

- Group leaders report back to large group about their discussion.

11:30 a.m. – 12:15 p.m.
Lunch and networking break

12:15 p.m. – 1:30 p.m.
Open forum: 1-2-4-All

- Engage participants to share ideas, questions and suggestions

1:30 p.m. – 2:00 p.m.
Concluding remarks and wrap-up

- Share main ideas from the day
- Hand out and complete event feedback forms

One-Day Ideas Exchange Event

Facilitators can find detailed instructions for the **one-day event** in Appendix A.

Objectives

1. Participants have a common understanding of social isolation among seniors, its' impact, and the risk factors and protective factors for social isolation in their community.
2. Participants begin to identify opportunities for working together. Ideas to form strategic networks are raised and discussed. The purpose of these new networks will be to apply local knowledge to aid in the creation of draft action plans to address social isolation in their community in the future.

Materials

Post it notes, flip charts, paper and tools (below) for each group, **feedback forms** (Appendix F).

Tools

1. **PowerPoint Presentation** (Appendix E)
2. **SWOT Analysis Template** (Appendix B)
3. **Social Network Webbing Map** (Appendix B)

Suggested agenda

8:30 a.m. – 9:00 a.m.
Welcome and opening remarks

9:00 a.m. – 10:00 a.m.
Presentation on social isolation and social innovation

- Present and discuss an example illustrating a socially innovative solution to seniors' social isolation

10:00 a.m. – 11:00 a.m.
Step 1: Group discussion on addressing social isolation

- Small groups identify seniors in their community at particular risk of social isolation and choose one of the "best practice" strategies for addressing social isolation for this group

11:00 a.m. – 11:15 a.m.
Break

11:15 a.m. – 12:15 p.m.
Step 2: Community assessment

- Small groups identify the age-friendliness of their community using the SWOT analysis template
- Group leaders report back to large group

12:15 p.m. – 1:00 p.m.
Lunch break and networking

1:00 p.m. – 2:00 p.m.
Step 3: Moving to action

- Small groups apply principles of social innovation to reach their goals
- Group leaders report back to large group

2:00 p.m. – 2:15 p.m.
Break

2:15 p.m. – 3:15 p.m.
Step 4: Getting started—Building the network

- Small groups use the Social Network Webbing Map to brainstorm their connections, and those they need to develop, to reach their goals
- Group leaders report back to large group

3:15 p.m. – 4:30 p.m.
Concluding remarks, wrap-up and next steps

- Each participant identifies one step they will take to advance the goal(s) after the event
  - **If the event ends here,** participants review the results of their social network map and commit to taking action. Hand out and complete event feedback forms
  - **For two-day events,** participants review the results of their social network map and commit to taking action and timelines. Homework should be assigned before Day 2

Two-Day Ideas Exchange Event

First, complete the one-day ideas exchange event (above). Continue with the suggested agenda for the second day as presented below. Facilitators can find detailed instructions for **two-day events** in Appendix A. An experienced facilitator will be required.

Objectives

1. Participants have a shared understanding of the principles of social innovation and how they can be applied to achieve collective impact on social isolation.
2. Participants work towards an Impact Plan to collectively address social isolation at the population level in their community.

Materials

Post it notes, flip charts, paper and tools (below) for each group, **feedback forms** (Appendix F).

Tools

1. *Social Isolation of Seniors: Volume I: Understanding the Issue and Finding Solutions*
2. **Theory of change template** (Appendix B)
3. **Impact Plan example and template** (Appendix B)

Sample agenda

8:30 a.m. – 9:00 a.m.
Welcome and opening remarks

9:00 a.m. – 9:30 a.m.
Introduction

- Overview of day 1, purpose of Day 2 and how it builds on Day 1

9:30 a.m. – 10: 30 a.m.
Presentation – Population level change through collective impact

10:30 a.m. – 10:45 a.m.
Break

10:45 a.m. – 12:00 p.m.
Group activity – Commitment to change

- Commitments from Day 1 and steps taken (presented to large group)
- Small groups complete the Theory of Change template
- Group reporters describe intended impact and theory of change

12:00 p.m. – 12:45 p.m.
Networking and lunch break

12:45 p.m. – 1:15 p.m.
Presentation: Reviewing collective impact and introduction to impact plans

1:15 p.m. – 3:00 p.m.
Group activity – Developing impact plans

- Groups build on their theory of change to develop an impact plan

3:00 p.m. – 3:15 p.m.
Break

3:15 p.m. – 4:00 p.m.
Open forum: What have we accomplished?

- Group reporters share their impact plans with large group for feedback

4:00 p.m. – 4:30 p.m.
Concluding remarks, wrap-up and next steps

- Open forum to identify learning
- Develop a leadership committee with leaders for each project/ initiative identified as necessary to achieve the overall impact plan
- Commit to follow-up meeting
- Distribute and complete event feedback form

Example of Tools (Overview)

To help facilitators decide which tools will be most useful to their situation and event, this section contains a brief description of the tools included in Appendix B. They vary in complexity and time commitment and can be used by groups at different stages. The tools and templates can be used as-is or can be adjusted to fit the objectives of the group or the preferences of facilitators.

1 1-2-4-All (or 1-3-6-All)

- **Purpose:** To engage every participant at once, quickly generating questions, ideas, and suggestions. It is a simple method for building naturally toward agreement or shared understanding.
- **Benefit:** Includes everyone immediately, regardless of group size; ideas are generated quickly. Participants contribute their own ideas, so follow-up and implementation is simplified.
- **When to use:** To open conversation and generate ideas. It could also be used at the end of a session to wrap up. Suggested for partial-day and one-day events.
- **Group size:** Any – adapt activity depending on the number of participants.
- **Previous knowledge required:** None
- **Time required:** 12 minutes per question or round
- **Complexity:** Simple

2 SWOT Analysis

SWOT is an acronym for **strengths, weaknesses, opportunities** and **threats.**

- **Purpose:** To provide a framework for understanding and decision-making, for reviewing strategy, position and direction of a group or idea.
- **Benefit:** Organizes data into a logical format to help a group understand, present, discuss and make decisions. The analysis identifies concerns that need attention and leads to action. This tool can be used by participants to prepare before coming to the event or used as a take-home exercise after an event for future action planning.
- **When to use:** For brainstorming at meetings and workshops. Best used at one-day ideas-exchange events.
- **Group size:** Any. Small groups of 5–8 participants and small group analysis could be shared with the larger group to identify similarities and differences.
- **Previous knowledge required:** Some knowledge about risk factors and protective factors related to social isolation (can be presented before the exercise) and of the community.
- **Time required:** 60 minutes
- **Complexity:** Simple

3 Social Network Webbing

- **Purpose:** To list informal connections and plan to strengthen the network to achieve a purpose.
- **Benefit:** Quickly identifies the resources that exist or could be explored through the group's network of contacts. It also plans opportunities to strengthen existing contacts and to access new resources. This could be a take-home exercise for participants, before or after an event, to build momentum for planning action.
- **When to use:** To list existing contacts for planning action. Suggested for one-day ideas-exchange event.
- **Group size:** Any. Small groups of 5–8 participants and small group analysis could be shared with the larger group to identify similarities and differences.
- **Previous knowledge required:** Participants should have good knowledge of their community and its services.
- **Time required:** 60 minutes
- **Complexity:** Simple

4 Theory of Change

- **Purpose:** To decide the goals of participants and how to achieve them.
- **Benefit:** Participants list all ideas on a single page and then combine them to make one concise statement of their theory of change. This could also be a take-home exercise for participants after the event to build momentum for planning action.
- **When to use:** When goals are not yet clear, for participants to agree on goals, their impact, and how to achieve them.
- **Group size:** Small groups of 5–8 participants and small group analysis should be shared with the larger group to identify similarities and differences.
- **Previous knowledge required:** Participants should have some knowledge about social isolation and social innovation (presented at two-day ideas exchange event).
- **Time required:** 60 minutes
- **Complexity:** Medium. Facilitator requires good knowledge of principles of social innovation and theory of change.

5 Impact Plan for Collective Action

- **Purpose:** To develop a common plan for a group to work together towards in response to a major challenge in the community.
- **Benefit:** Can solve or bring important change to complex community problems (e.g. social exclusion, poverty, age-friendliness of communities, sustainability of food). Each sector shares how it sees the problem and they work together to create a common vision and action plan. Participants share findings and supporting activities.
- **When to use:** To develop a community plan to address social isolation in the community when several organizations are involved. Suggested for the two-day ideas exchange event.
- **Group size:** Small groups of 5–8 participants and small group analysis should be shared with the larger group to identify similarities and differences.
- **Previous knowledge required:** Participants need to know about their community and its services. They should have information about the collective impact model and how to develop an impact plan before doing the exercise.
- **Time required:** 2 hours
- **Complexity:** Medium. Preparation requires considerable time, commitment and effort. Facilitator must have good understanding of the collective impact model and how to develop an impact plan.

Conclusion Suggestions for Next Steps

For a community to put a plan of action in place to address social isolation, it is very important to keep momentum after the ideas exchange events. If too much time goes by between an event and follow-up discussions, it is easy for participants to move on to other tasks and ideas. These suggestions will help participants who want to take an innovative solution to social isolation to the next level:

- Assign a willing coordinator or champion to lead follow-up discussions and ongoing work with the community.
- Following an event, promptly take note and share results and commitments with participants. Highlight the keys issues that arose during the event and any potential solutions raised that can be explored further by community partners.
- Circulate a list at the event for people to write down their contact information, with the understanding that it will be distributed to other participants. This will be vital in keeping and making contacts after the event.
- Identify key participants who were not present at the first event but could be vital to the success of the intended solution to social isolation in your community.
- Decide the roles and responsibilities of the partners in a possible initiative. Consider administrative functions, discussion facilitators, financing, agenda setting and leadership roles.
- Make a timeline of how the group will move from start to finish, outlining the major milestones along the way for achieving the initiative.
- Discuss the expected costs of the project and possible funding options.
- Plan how you will measure and evaluate the success of your project.

Appendix A Instructions for Facilitators

Partial-Day Ideas Exchange Event

Content

Presentation on Social Isolation and Social Innovation
(see Appendix E for suggested content).

Example to illustrate a socially innovative solution to seniors' social isolation:

- One community wanted to increase the participation of seniors in the community by making businesses more age-friendly. A variety of sectors, including business (chamber of commerce, shopping centre, Canadian Association of Pre-Retirement Planners), seniors' organizations (The Older Adult Centre, Retired Teachers Association) and the municipal government (the mayor and city council's committee on senior issues) helped. Together they started the Friendly to Seniors Program, to assess local businesses in the areas of senior friendliness, resources, awareness literature and suggestions for improvements. Participating businesses receive a Friendly to Seniors certificate.
- The expertise and resources of a variety of sectors brought a lot of helpful ideas to this project. The success and durability of this rests on these partnerships and their willingness to share risks, benefits, and outcomes.

Note: It is important that the community relate to the example. Adapt it as necessary.

Activities

Choose one of two possible activities to do after the presentation:

- **Activity 1 –** understanding social isolation and lowering the risks of social isolation by improving protective factors. This activity is useful for communities that are just beginning to think about social isolation as a community issue.
- **Activity 2 –** applying the principles of social innovation to a case study. This activity is useful for communities that have a good understanding of social isolation and have already made some group effort to address it.

Use the following case study for both activities. Give participants a copy of the case study and have them work together in small groups to analyze it, using the questions for either Activity 1 or 2. Make sure that each table includes participants from different sectors. Each group should choose a secretary and a reporter. At the end of the activity the reporter reports back to the large group. The facilitator writes points on a flip chart. At the end of the day, the group secretaries give their notes to the facilitator.

Troy is a small prairie town within commuting distance from the city where most health, social and recreational services are situated. There are a high number of older seniors in Troy and the surrounding areas that have lived there for a long time. Unlike many other rural communities Troy is growing. There are also many working families and new retirees from the resource industry who have come to Troy. Many of those who have arrived in the last few years are recent immigrants to Canada making the community more culturally diverse than it used to be. The growing population has also added services and businesses to the small town.

The municipality has surveyed seniors about their concerns.
The older residents feel psychologically disconnected from their community because of the large number of incomers and resulting changes. Seniors living out of town are physically distanced from town by barriers related to winter weather, geography and transportation. Almost all seniors say they want to age in place, but appropriate, affordable housing and access to medical care are barriers to that. Many seniors are lonely and are at increased risk of social isolation because of mobility issues, caregiving responsibilities, or living alone.

The municipality has convened a community-wide meeting to discuss the issues facing seniors. They have invited citizens, community organizations (Legion, Lions, 4H, Big Sisters) businesses (Co-op, insurance company, restaurant, Troy Care Home) and representatives from public organizations (schools, library), faith groups and the provincial government.

Note: It is important that the community relate to the example. Adapt it as necessary.

Activity 1 **Instructions to groups**

1. Think about the concerns of seniors in Troy. Discuss what could be done to address some of the concerns expressed by seniors there.
2. Consider the risk factors and protective factors for social isolation – how can the risks factors be minimized and the protective factors improved on?
3. Which risk factors are most common in this community?
4. Which protective factors could be strengthened? Use these to prioritize initiatives.

Activity 2 **Instructions to groups**

1. How can the principles of social innovation lead to solutions for the issues faced by seniors in Troy?
2. How could different people and organizations in the community work together to support a solution to meet the needs of the seniors?
3. How could Troy strengthen its assets, programs, funding, and expertise? What new cross-sectoral partnerships are possible (business, community, citizens and governments)?
4. Are there successful projects for other groups or from places that could be adapted?
5. Is there a new approach that would respond to the issue?
6. Are there changing attitudes or developing initiatives (e.g. Age Friendly Community movement) to connect to?
7. Could new technologies help create solutions?

Wrap-up Activity

Ask participants to identify what they can do in their community after the event. Use "1-2-4-all" tool (Appendix B).

- What do you hope happens in the future?
- What practical first step can **you** take now to move things in this direction?

Group reporters share results of activity with larger audience.

Next steps

To keep momentum after the event, write down the results of the activity and the steps participants commit to take in the next month. Groups will form around different issues. Encourage participants to set follow-up meetings before they leave the event. Participants can add their contact information to a list to stay involved, with the understanding that it will be shared with other participants.

Participants complete event feedback form (Appendix F)

After the event

The facilitator writes an event report (Appendix G) based on their observations, notes from group secretaries and completed feedback forms. Facilitators should follow up with participants to share key issues from the event, especially those that need further exploration.

One-Day Ideas Exchange Event

Content

Presentation – same as for the partial-day ideas-exchange event

Activity

Step 1 **Small Group Discussion**

Break into small groups. Each table should have participants from different sectors. Each group chooses a reporter and a secretary. The reporter reports back to the larger group. The facilitator writes points on a flip chart. At the end of the day, group secretaries give their notes to the facilitator.

Have each group discuss which seniors are at particular risk (i.e. vulnerable) of social isolation in their community. Once group participants agree, each group chooses a population to focus on, using the strategies below. Groups can share the same focus. Otherwise, especially with a smaller audience, groups can address seniors in general.

Following the steps below each group focuses on one best practice strategy for addressing social isolation for the population they chose:

- increasing access to services/programs;
- increasing seniors' participation in social activities; or
- increasing social and community capacity.

Step 2 Community Assessment

Identify Current State of Age Friendliness

Think about the physical and social environments, programs and services that seniors need every day. Using the **SWOT analysis template:**

- What are the resources and strengths in our community? What are some of the factors that help social inclusion? What is done well in our community?
- What are the barriers to social inclusion of seniors in our community? Consider physical, economic, community, service and social barriers (e.g. attitudes, beliefs, institutions, structures).

Group reporters report to the larger group, each adding only what is different.

Facilitator gathers and summarizes information in the large group.

Completed SWOT analyses are posted on the wall or on flip charts.

Step 3 Moving to Action

Choose goal

- What is our goal in our community?
- How can we apply the principles of social innovation to reach our goal?
  - Brainstorm what can be reasonably addressed: short term and long term.
  - Are there possible partners in other sectors?
  - Can a successful approach from one context be adapted to another?
  - Can a successful project be expanded or reduced to suit our purposes?
  - Is there an opportunity to create a social enterprise?
  - Are there changing attitudes and beliefs (e.g. importance of activity) or changes (structural, institutional or structural) that could impact solutions?
  - Could new technologies help?

Ideas are written on Post-it notes and posted with each group's SWOT.

Group reporters report to the larger group.

Facilitator gathers and summarizes information in the large group.

Step 4 Getting Started—Building the Network

Using a social network webbing map groups identify connections they have or could develop to reach their goal. This exercise draws out resources in existing relationship networks and the steps to take in order to access those resources. It also identifies opportunities for strengthening connections. Groups report their ideas to the large group. The audience can add their suggestions for other connections. The facilitator collects the information and summarizes it for the large group.

Wrap-Up

The wrap-up session will show community readiness and commitment and should determine whether the event ends here or participants would like to continue discussing this topic over a second day. The facilitator could lead this section by:

- Asking what have we learned?
- Asking each participant to identify one step they will take to move the goal(s) forward after the event. Add to group flip charts.
- If one is not already planned, proposing a second day to the event, to develop a community impact plan where participants can work together to build on existing ideas to customize a community response to social isolation.

Next steps

The facilitator asks participants to (1) review the Social Network Mapping results and to identify at least one individual/organization that they will follow up with in the next month; (2) commit to taking the actions they identified in the wrap-up. Encourage participants to form groups around actions and to plan a future meeting. Participants can add their contact information to a list to stay involved, with the understanding that it will be shared with other participants.

If there is a second day to the event, also ask participants to finalize commitments and set timelines before the second day begins and to be prepared to report on these to the group. Participants could also review the Theory of Change information (**included**) and the **Collective Impact Plan module** prior to the second day event. Determine if there are any individuals or organizations who did not participate in Day 1 of the event who should be invited to the Day 2 of the event.

Participants complete event feedback form (Appendix F)

After the event

The facilitator and planning committee write an event report (Appendix G) based on their observations, notes from group secretaries and completed feedback forms. Facilitators should follow up with participants to share key issues from the event that need further exploration. This is especially important if a second day is planned.

Two-Day Ideas Exchange Event

First, complete the one-day ideas exchange event (above). It is designed to be either a standalone event or provide content for the first day of the two-day event. Provide several weeks between day 1 and day 2 to allow for tasks to be completed, but not so much time that momentum is lost. Continue with the instructions for the second day as presented below.

Content

- Introduction – The facilitator gives a short overview of Day 1, outlines the purpose of day 2 and how it builds on day 1.
- Presentation (suggested topics to present – not included in the Toolkit; it is for facilitator/organizers to prepare and develop)
  - changing a community through collective impact
  - choosing measurable goals and sharing existing statistics
  - making a collective impact through social innovation
  - expanding social innovation principles introduced during day 1 with application examples (from *Volume I: Social Isolation of Seniors: Finding Innovative Solutions*)

Activities

Participants break out into their day 1 groups. New participants are assigned to groups (based on their identification in group social networking maps on day 1, where applicable). Each group chooses a reporter and a secretary. The original flip charts with Post-its and work from day 1 should be available.

1. Commitments – The group reporters review their day 1 goal(s) and social networking maps with the larger group. Individual members report what steps they have taken since Day 1.
2. Building on Day 1, each group completes the Theory of Change template to clarify their intended impact on socially isolated seniors and how it will be achieved (template includes instructions).

   Group reporters describe their intended impact and Theory of Change to the larger group. As a large group, identify similarities and difference between groups Theory of Change templates and if appropriate combine to create one Theory of Change.
3. Presentation: Review collective impact and introduce Impact Plan Example and Template
   - Briefly review the concept of collective impact. Present and answer questions on the Impact Plan Example and Template (see Appendix B).

4. Each group builds on the Theory of Change agreed upon by the larger group to develop an impact plan, using the Impact Plan Template (both in Appendix B).
   - Building on the goal that was decided by the work on day 1, each group identifies measurable community-wide outcomes.
   - Building on day 1 work and local knowledge each group discusses:
     - How can we partner to access funds and assets?
     - How can we partner to share risks, benefits and outcomes?
   - Each group designs individual projects that contribute to the impact plan outcomes.
     - How do they contribute to the plan?
     - How will the activities of each project lead to the project outcomes?
   - What outputs and outcomes will result from the impact plan?
   - How can the impact plan stay strong and continue?
5. What have we accomplished?

   The group reporters share their impact plans with the large group. If the small group impact plans target the same seniors population (e.g. seniors in the same geographic area), combining them into one impact plan should be considered. If the small group impact plans address different populations then there may be a need to keep the impact plans distinct from one another, although opportunities to contribute to each other's impact plans should be provided. The facilitator collects and summarizes information, as necessary.

Wrap-up

What have we learned? Large group.

Next steps

Ask participants to commit to develop an impact plan leadership committee, and choose a leader for each project that will contribute to the plan. Take note. Ask these groups to plan at least one follow-up meeting to keep momentum. Give them the information about theory of change (included) and refer them to the following link (**www.innoweave.ca**) for information for future group work on collective impact planning.

Participants complete event feedback form (Appendix F)

After the event

The facilitator and planning committee write an event report (Appendix G) based on their observations, notes from group secretaries and completed feedback forms. Facilitators should follow up with participants to share key issues from the event that need further exploration.

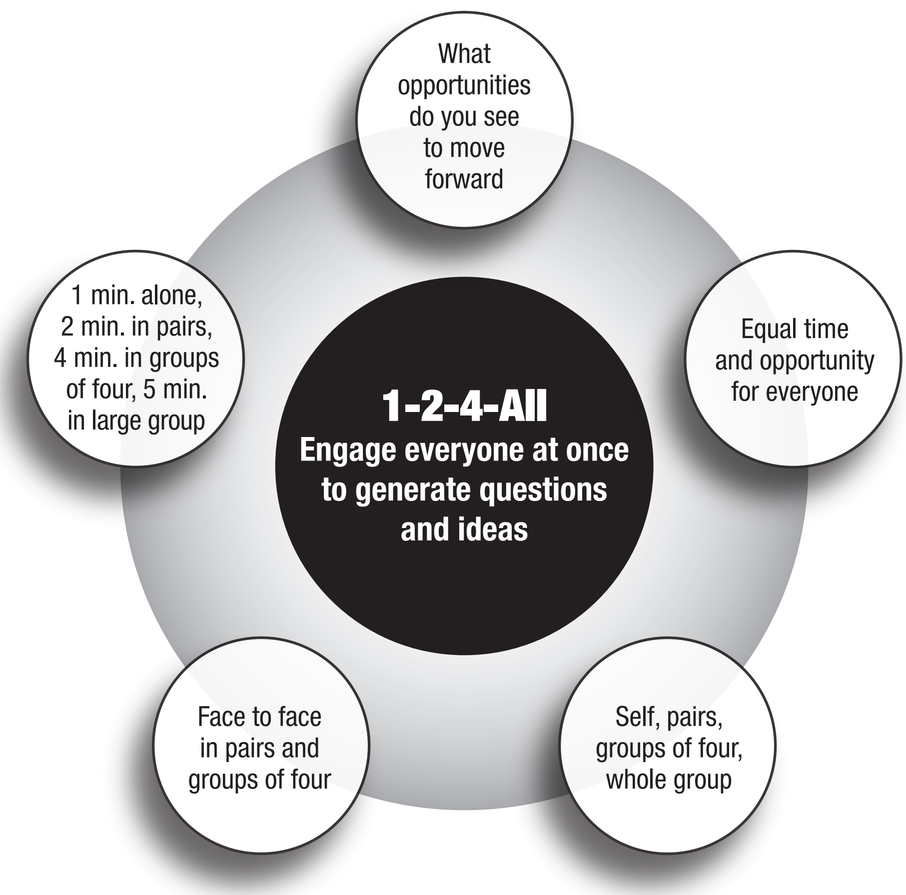
Appendix B Tools for Ideas Exchange Events

1-2-4-All (or 1-3-6-ALL)

- **Goal:** Engage all participants to find questions, ideas and suggestions
- **Brief Description:** The 1-2-4-All tool is used to generate questions, ideas and suggestions. A question is put to the group, which then engages in silent individual self-reflection, followed by discussion in pairs, then in groups of 4, and then in the entire group. The 1-2-4-All activity could be modified to 1-3-6-All if it fits better with the number of participants.
- **Time needed:** 12 minutes per question or round
- **Participants:** Everyone can participate using this tool and the group size does not matter.
- **Space and Materials:**
  - Unlimited number of groups
  - Space for participants to work face-to-face in pairs and groups of four
  - Chairs and tables optional
  - Paper for participants to record observations and insights
- **Instructions:**
  - Ask participants to spread out from one another and stand-alone initially.
  - Ask a question related to the issue of discussion.
  - Participants are given 1 minute to reflect on the question alone (e.g. What opportunities do **you** see for making progress on this challenge? How would **you** handle this situation? What ideas or actions do **you** recommend?) 1 min.
  - After the minute is up, ask participants to find a partner. In pairs, ask participants to compare, improve or expand on the individual ideas. 2 min.

- After two minutes, ask each pair of participants to join with another pair, forming a small group of 4 individuals. Share and develop ideas from your pair in groups of four (notice similarities and differences). 4 min.
- Finally, each group shares one important idea with all. Ask, “What is one idea that stood out in the conversation?” (repeat cycle as needed). 5 min.

Note: These guidelines are also illustrated in the figure below.



- **Tips and Traps:**
  - Firmly facilitate quiet self-reflection before paired conversations.
  - Ask everyone to write down their ideas during the silent reflection.
  - Stick to the timeline; use a bell to announce transitions.
  - In a large group during the large group session ("all"), limit the number of shared ideas to three or four.
  - In the large group, assign a secretary to record ideas that were not shared.
  - Invite each group to share one **new** idea.
  - Defer judgment, make ideas visual and be creative.
  - When people start running out of ideas, change to another form of expression (e.g. improvisation, sketching, stories).
  - Maintain the rule of one conversation at a time in the large group.
  - Do a second round if you need to go deeper.

Adapted from **www.liberatingstructures.com/1-1-2-4-all/**

SWOT Analysis – Community Assessment

SWOT is an acronym for Strengths, Weaknesses, Opportunities and Threats.

- **Goal:** Look at information and organize it logically to help people understand, present, discuss and make decisions.
- **Brief Description:** A SWOT analysis guides you to identify the positives and negatives inside your organization (S-W) and outside of it, in the external environment (O-T). Developing a full awareness of your situation can help with both strategic planning and decision-making.

  Sample Questions Suitable for SWOT Analysis
    - For example, using a local map, identify what helps seniors in the community stay healthy, engage in and access activities, feel safe and connect with each other.
    - What places bring or could bring seniors together? What is available to community residents but not to seniors?
- **Time needed:** 60 minutes
- **Participants:** Groups of any size may participate in this activity. Large groups may be broken up into smaller groups of 5–8 participants.
- **Space and Materials:**
  - Unlimited number of groups
  - Space for participants to work in small groups
  - Chairs and tables optional
  - SWOT template
  - Flip chart paper and markers

- **Instructions:**

1. Divide participants into small groups (5–8 participants)
2. Provide each group with a copy of the SWOT template(s) (included), flip chart paper and markers
3. Explain the activity and what is meant by strengths, weaknesses, opportunities and threats
4. Ask each group to identify and discuss the strengths, weaknesses, opportunities and threats, using the template provided, for the following themes:
   - **An Informed Society**

     Older adults, organizations and the community must understand the needs of all citizens and ensure communication and sharing of information. An informed society:

     – continually consults older adults regarding their needs and interests;

     – ensures older adults have the information they need to participate, using a variety of approaches;

     – shares information and provides appropriate training for staff members, volunteers, and decision makers at all levels within an organization; and

     – shares information about older adults with the community.

- **An Enabling and Supportive Environment**

  Comprised of a supportive social environment and a physically accessible environment, it ensures:
  - access to flexible programs, services, and supports;
  - opportunities for meaningful social participation, also for those who are socially isolated;
  - the social environment fosters safety and security, respects dignity-of-choice and reduces the risk of mistreatment, abuse, and neglect; and
  - the physical environment meets or exceeds current accessibility standards and that older adults can safely access and maneuver inphysical environments.
- **Personal, Social and System Connectedness**

  Older adults, organizations, and the greater community are all connected and interdependent. When all community members work together, it strengthens the community. Personal, social, and system connectedness:
  - builds meaningful partnerships between older adults and service providers;
  - recognizes that all older adults are partners in their own care; and
  - builds partnerships between service providers to create a responsive system to meet the changing needs of older adults.

This activity was adapted from: © Alan Chapman 2005–08. Free PDF version of this tool and information about SWOT analysis methods are available at **www.businessballs.com/swotanalysisfreetemplate.htm**

SWOT Analysis Template Example

What are you assessing?

(The sample criteria can apply to more than one quadrant. Using knowledge of your community, identify and add criteria appropriate to your own SWOT situation.)

Strengths	Weaknesses
Criteria examples ■ Affordable, accessible resources (transportation, housing?) ■ Level of community age-friendliness? ■ Experience, knowledge, data? ■ Financial and/or in-kind resources? ■ Level of awareness of social isolation? ■ Number of collaborators? ■ Shared philosophy and values?	**Criteria examples** ■ Identifiable champions? ■ Location of services/programs? ■ Gaps in capabilities? ■ Number of services? ■ Range of partners? ■ Morale, commitment, leadership? ■ Availability of volunteers? ■ Diversity of network? ■ Quality of relationships?
Opportunities	**Threats**
Criteria examples ■ Young seniors, students in high school and/or professions that that can be engaged? ■ Related initiatives to piggy back on (eg. age-friendly community? Technology development and innovation? Information and research? Availability of grants? Political trends? New partnerships? Related provincial or municipal initiatives?)	**Criteria examples** ■ Scarce resources? ■ Sustainable financial backing? ■ Duplication of efforts? ■ Competing initiatives? ■ Ageism? ■ Availability of time, personnel? ■ Financials? ■ Timescales, deadlines and pressures? ■ Effects on partners' core activities?

Adapted from Alan Chapman 2005–08. Free PDF version of this tool and information about SWOT analysis methods are available free at **www.businessballs.com/swotanalysisfreetemplate.htm**.

SWOT Analysis Template

What are you assessing?

Brainstorm SWOT in your community and complete each quadrant.

Strengths	Weaknesses
Opportunities	**Threats**

Adapted from Alan Chapman 2005–08. Free PDF version of this tool and information about SWOT analysis methods are available free at **www.businessballs.com/swotanalysisfreetemplate.htm**.

Social Network Webbing

- **Goal:** To list informal connections and plan to strengthen the network to achieve a purpose.
- **Brief Description:** Social network webbing quickly illuminates for a whole group what resources are hidden within their existing network of relationships and what steps to take to access those resources. It also makes it easy to identify opportunities for strengthening connections and making new ones. The inclusive approach makes the network visible and understandable to everyone in the group at once. It encourages people to take initiative to build a stronger network. Informal or loose connections—even friends of friends—are added and can have a powerful influence on progress without detailed planning and big investments.

  Benefits of the Social Network Webbing activity are as follows:
  - Tap into the informal connections that have indirect yet powerful influence on behavior and results;
  - disseminate knowledge and innovation across scales and boundaries—in and beyond the organization;
  - develop more frontline ownership and leadership for change;
  - help people see connections and gaps in expertise in their network;
  - help people organize themselves and develop groups that are more resilient and able to absorb disruptions;
  - tip the balance toward positive change; and
  - operate without big budgets and extensive planning by drawing on informal social networks and inviting people to contribute.
- **Time needed:** 60 minutes

- **Participants:** Groups of any size may participate in this activity. Everyone involved in the core working or planning group is included. Everyone has an equal opportunity to contribute. Small groups of 5–8 participants and small group analysis could be shared with the larger group to identify similarities and differences.
- **Space and Materials:**
  - Unlimited number of groups
  - Space for participants to work in small groups
  - Chairs and tables optional
  - A long open wall with large sheets of paper or multiple flip-chart pages
  - 2” × 2” Post-it notes in at least eight colors
  - Thick-tip black pens (e.g. Sharpies)
  - 1-2-4-All tool
- **Instructions:**
  - Introduce the activity: Invite the members of a core group with a shared purpose to create a map of their network and to decide how to expand and strengthen it.
  - Use **1-2-4-All** (above) to find the names of all the key groups.
  - Together as a group, find the names of people in the network and construct the map.
  - Ask them to name the people they are currently working with and those they would like to include in future work (i.e. people with influence or expertise who could help achieve their purpose). You can organize names by areas of expertise or other criteria relevant to achieving your goal.
  - Invite group members to note their connections in the web to advance their purpose.

- Create a legend of all the key groups in the network needed to achieve your purpose and assign a Post-it color or symbol for each. 5 min.
- Every core group member prints clearly his or her name on a Post-it. Put the Post-it notes in a group in the centre of the wall. 5 min.
- Ask all core group members, “Who do you know who is active in this work?” Tell them to write each of their names on a Post-it note and arrange them based on each person’s degree of separation (personal acquaintance, friend of friend, other) from each design group member. 10 min.
- Ask all core group members, “Who else would you like to include in this work?” Encourage them to brainstorm and make Post-its for the other people they would like to include. Ask them to build the map of Post-its as a web with a centre and outlying areas (showing the actual and desired spread of participation). People in this group can be your friends’ friends. New legend categories and colors may be needed as the web expands. 10 min.
- Tell the core group to step back and ask, “Who knows whom? Who has influence and expertise? Who can block progress? Who can boost progress?” Ask them to illustrate the answers with connecting lines. 15 min.
- Ask the group to devise strategies to: 1) invite, attract, and “weave” new people into their work; 2) work around blockages; and 3) boost progress. 10 min.

■ **Tips and Traps:**

- To avoid confusion, do not include more than 10 functions or distinct groups in the legend.
- Ask the core group to focus on developing a productive “centre” to their web and a diverse periphery that adds new ideas and growth. The periphery is often in your friends’ friends network and they can be very helpful.
- Write down people’s names whenever possible, instead of positions or titles.

Attribution: Adapted from Liberating Structure (**www.liberatingstructures.com/23-social-network-webbing/**) developed by Henri Lipmanowicz and Keith McCandless. Inspired by June Holley, network weaver.

Theory of Change

- **Goal:** To build consensus on the goals of participants and how to achieve them.
- **Brief Description:** Theory of change helps leadership teams clarify their 3–5 year impact commitment and how they will achieve it. It includes:
  - two pages of background and instructions
  - one worksheet

  Benefits of the Theory of Change activity are as follows:
  - Using the worksheet brings deeper understanding of what we want to accomplish and how to do it.
  - It allows the team to put all these ideas on a single page, and then unify them into a concise statement of their theory of change.

  Note: Developing an impact statement and theory of change is **not** a short, simple, one-time activity. This micro-tool is intended as an introductory or facilitative aide to help **us** visualize our theory of change, and help catalyze discussions among the group leaders throughout this process.
- **Time needed:** 60 minutes. Completing an individual worksheet should take about 45 minutes. It should then be refined through discussion with the organization's leadership team, and tested with internal and external evidence (and re-done multiple times, as necessary).
- **Participants:** Groups of any size may participate in this activity. Small groups of 5–8 participants and small group analysis could be shared with the larger group to identify similarities and differences.
- **Space and Materials:**
  - Unlimited number of groups
  - Space for participants to work in small groups
  - Chairs and tables optional
  - A long open wall with large sheets of paper or multiple flip-chart pages
  - 2" × 2" Post-it notes in at least eight colors
  - Thick-tip black pens (e.g. Sharpies)
  - 1-2-4-All tool

- **Instructions:**

1. Identify the main problem you want to solve. This is your group's mission objective—the main challenge you want to address.
2. Provide each small group with a Theory of Change template and ask the groups to fill it out.
3. As you move across the sheet, you will gradually specify your thinking, moving from your mission-goals through to your specific intended impact (i.e. the outcomes for which you will hold your organization accountable). Complete the other boxes, such as your target beneficiaries for addressing this problem, and what benefits you intend to create. Try to be as specific as possible because it will help you to come up with more effective actions to take.
4. Work from defining your problem, towards our long-term impact. Identify the main changes that are necessary, or barriers that must be overcome, in order to reach the intended impact. Then consider the main actions you need to take in order to create the intended impact (i.e. your activities). Think of some practical steps to take to make changes that support the intended impact—like creating or sustaining partnerships, or fine-tuning existing processes. Try to keep these as action-oriented as possible.
5. Identify the key outcomes you want see, focusing specifically on those to which you will hold your organization accountable, as a result of your activities. Note the evidence you want to see, as proof of these outcomes. These could be tangible results that you can show to other people to clarify how your work is making a difference.
6. As you fill each of the boxes in the worksheet, it is critical to also reflect on the key assumptions that support these steps in your work. This can help you to notice risks or connections between the different projects. As you consider your activities, you should also note the resources you need to do them.

7. Complete the sheet by crafting a concise statement or diagram of your theory of change (either in the document, or on a separate sheet), based on the elements outlined in the worksheet. It is better to write a clear, focused intended impact statement and theory of change and have some disagreement among team members with the resulting document, than to write a vague or broad intended impact and theory of change that includes all points of view.
8. Re-do the worksheet several times with your team to develop and discuss the different components that can be present on your path to achieving your intended impact.

Attribution: Adapted from Innoweave Theory of Change **www.innoweave.ca**.
Innoweave is an initiative of the J.W. McConnell Family Foundation, in collaboration with SIG thought leaders, academics and partners from the private, public, and not-for-profit sectors.

Theory of Change Template

Mission	1	**What problem are you trying to solve, or change do you want to see?** Identify the change you hope to see as a result of your activities.		Assumptions
Intended Impact	2	**Who do we want to benefit?** Be specific (e.g. demographics, key stakeholders, geography).		Assumptions
	3	**What are the benefits you wish to create for them?** Identify the impact you would like to have on your beneficiaries.		Assumptions
Theory of Change	4	**What changes are needed, or barriers must be overcome, to achieve your intended impact?** Changes should be measureable and evidence-based.		Assumptions
	5	■ **Activity A**	What will you do to make the change?	Resources needed for these activities
		■ **Activity B**		
		■ **Activity C**		
	6	■ **Outcome A**	Desired outcome as a result of activity, to which you are committed	Resources needed for these activities
		■ **Outcome B**		
		■ **Outcome C**		

Theory of Change		
	7 ■ **Evidence A** Evidence of the desired outcome ■ **Evidence B** ■ **Evidence C**	Resources needed for these activities
	Statement Concise statement of your theory of change.	**Context** External factors that impact your theory of change

Impact Plan Tool for Collective Impact

- **Goal:** To develop a common plan for a group of organizations to work together.
- **Brief Description:** The Impact Plan template is used to record collective impact initiatives that aim to make changes in the community, such as raising seniors' social participation by 10 percent, or cutting youth unemployment in a neighborhood in half. Collective impact means that a number of projects, each with their own goals and interventions, work together to make positive change in the community. (See **http://innoweave.ca/en/modules/collective-impact/** for more information).

  Achieving these goals takes commitment from community members, organizations, businesses and government leaders who care about the issue. It is important that ideas exchange events include leaders with influence from a variety of sectors who are willing to engage in the process. The issue being addressed must be considered urgent and important and there need to be enough resources to support the project.

  Groups of organizations working together that are not focused on population outcome goals will be very difficult to support through collective impact, even if they are doing valuable work together. Some of these groups can use the Innoweave process to develop population level outcomes or could be better supported in other ways, including those that do not necessarily wish to change population outcomes but instead wish to:

  – Scale a program. These groups can be better supported through the Innoweave **Scaling Impact** module.
  – Promote program participation. Participation often leads to an outcome, but is generally not an outcome in and of itself (e.g. attendance rate in itself cannot lead to a population outcome, but a graduation rate could). Groups that want to develop goals for population-level outcomes can use the Innoweave **Workshop 1** to refine their outcomes and to clarify how program participation will lead to those outcomes.

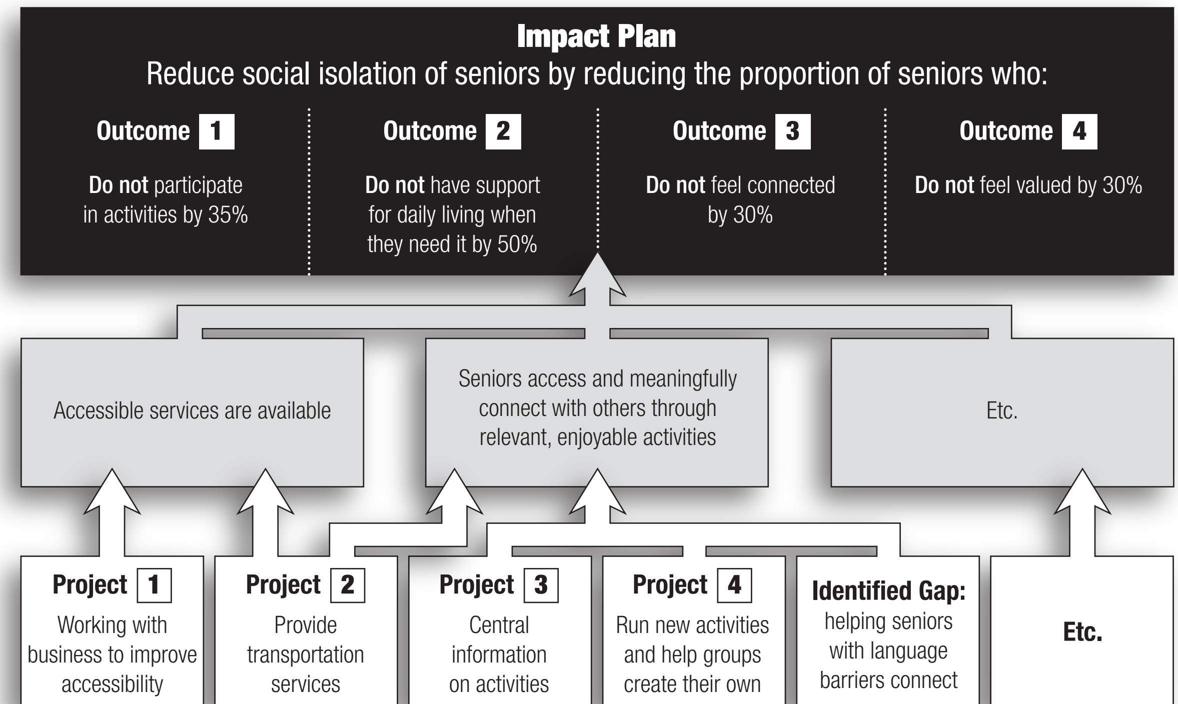
- Set broad inclusive goals (that are very hard to achieve with available partners and resources). Collective Impact requires population objectives that are clear and specific (e.g. reduce the gap in graduation rates between a specific group and the population average by 50 percent). Groups that want to focus on a single outcome goal (or area) can use the Innoweave **Workshop 1** to focus their outcomes.
- Collaborate, communicate or support one another on programs and projects that do not require collective impact. Groups should consider whether there are better ways to collaborate to meet their goals than to write an intended impact and theory of change that includes all points of view but is too vague or broad to achievable.

In these situations teams can repeat the worksheet to develop and discuss the different components that could help achieve the intended impact.

- **Time needed:** 2 hours. Preparation requires considerable time, commitment and effort.
- **Participants:** Groups of any size may participate in this activity. Small groups of 5–8 participants and small group analysis could be shared with the larger group to identify similarities and differences.
- **Space and Materials:**
  - Space for participants to work in small groups
- **Instructions:**
  1. Divide participants into small groups of 5–8 participants
  2. Distribute the Impact Plan Example and Impact Plan Template
  3. Explain the activity using the Impact Plan Example. The example of an impact plan shows how several projects can join together to reach community goals
  4. Ask small groups to use the Impact Plan template to design and write down their community plan.

Attribution: Adapted from Innoweave Theory of Change **http://www.innoweave.ca**
Innoweave is an initiative of the J.W. McConnell Family Foundation, in collaboration with SIG thought leaders, academics and partners from the private, public, and not-for-profit sectors.

Impact Plan Example



Impact Plan Considerations

1. How significant are **outcomes** L (level of change times population size with type of population considered)?
2. How well will Theory of Change achieve those outcomes — necessary or sufficient activities verified with logic flow?
3. Can the collaborating organizations and partners achieve the plan i.e. a) execute on **project level outcomes** effectively; b) fill any gaps; c) governance; d) measurement/ improvement)?
4. Impact Plan Value for money (reasonable project costs, cost effective, sustainable change, group leverage including partners that are not asking for funds).

Project-level Considerations

1. How important is the project to the impact plan?
2. How significantly does the project contribute to **project-level outcomes**?
3. How confident are we in organization's ability to execute at project level: quality of activities plan, organization capacity?
4. Project value for money (reasonable project cost, cost effective, project leverage).

Impact Plan Template

Impact Plan Outcomes	**Impact Plan Outcomes**					
Project Level Outcomes	**Project Outcome 1**	**Project Outcome 2**	**Project Outcome 3**	**Project Outcome 4**	**Project Outcome 5**	**Identified Gaps**

Project Activities and Outputs	**Project**	**Outputs**	**Lead Organization**	**Project-level Outcomes**
				e.g. #1, 3b, 6

Underlying Principles	

Attribution: Innoweave **www.innoweave.ca**

Appendix C Event Planning Checklist

- ☐ Form a multi- and cross-sectoral planning committee that includes local champions.
- ☐ Gather information about the local community. Detailed knowledge of local seniors and of community resources will help set the stage at ideas-exchange events and encourage discussion. Sources of information could be government statistics (provincial, regional and municipal) and directories of community services and programs. Participants at the events will also be able to share information about their community. Useful information may include:
  - population of community;
  - proportion of seniors;
  - characteristics of seniors (e.g. ages, gender, living situations, marital status, income levels, employment status);
  - communities of seniors (e.g. culture, ethnicity, faith);
  - organizations serving seniors; and
  - transportation, housing and social resources available to seniors.
- ☐ Decide whom to invite

  Diversity among participants ensures equally diverse perspectives and buy-in from as many stakeholders as possible. To move forward on addressing social isolation, you will need to ensure representation from the grass roots and those who are in leadership positions, end-users and those delivering services. Any emerging or potential champions in your community are also important.

Diversity in participant personalities, ages, styles and roles comes from including as wide a variety of people as possible. This will ensure that there are contributions from learners, organizers, catalysts, logical and emotional thinkers, etc.—all of which will lead to creative and productive meetings. Intergenerational engagement is important in addressing social isolation. The perspectives of younger adults and of organizations serving them can lead to identifying knowledge and strategies used with younger populations that can be adapted for older adults. Diverse partners can also be a big help in advancing your goals. For example, they might help with resources, marketing and collaboration. This list of suggested participants is not exhaustive and should be adapted to event size and with knowledge of the community:

- seniors from diverse communities (cultures, income, sexual orientation, abilities, gender, age, etc.);
- seniors organizations with diverse interests;
- advocates;
- community organizations (faith-based, volunteer, charities, foundations, etc.);
- private and business sectors;
- public sector;
- educators;
- health and social service sectors; and
- others.[1]

☐ How many participants will be invited?

☐ Will participants be invited by individual invitations or by an open invitation?

---

[1] The Mobilizing Community Sector Partners tool can be helpful in deciding who to invite from various community sectors. Accessed July 15, 2015.
http://afc.uwaterloo.ca/PDF/Mobilizing%20Partners%20Community%20Sectors.pdf

- ☐ Determine date, time, length of workshop.
  - See prototypes for half-, one- and two-day workshops
- ☐ Secure a senior friendly venue.
  - See checklists for planning and carrying out accessible meetings[2]
- ☐ Plan food and drinks for breaks, etc. (Remember allergies and cultural restrictions)
- ☐ Determine audiovisual needs.
- ☐ Establish agenda – pace and breaks should reflect participant needs.
- ☐ Engage speaker, facilitator.
- ☐ Determine cost of meeting and how it will be financed (e.g. grants, donations and cost to participants?)
- ☐ Create registration form, if required.
- ☐ Invite (see Appendix D) or advertise.
- ☐ Assign volunteers to support people with disabilities, to help facilitator, as recorders, as translators when required, etc.
- ☐ Prepare signage suitable for diverse abilities, languages, literacy, cultures.
- ☐ Prepare any handouts (agenda, background information etc.).
- ☐ Print event feedback form – (see Appendix F).
- ☐ Event report template (see Appendix G).

[2] Ontario Municipal Social Services Association. Accessed July 18, 2015. **http://omssa.com/accessible-community-engagement/omssa-guides/view-the-guides/guide-to-conducting-accessible-meetings**

Appendix D Sample Invitation

Social isolation among seniors is a growing issue with serious consequences for people and for society. Addressing social isolation is a shared responsibility that needs to be addressed together by the private, non-profit, academic and government sectors.

We (*description*) are hosting an event to share ideas about how to address social isolation among seniors in our community. The purpose of the event is to develop a shared understanding about the risks of social isolation and how to change them. We will explore socially innovative approaches to reducing social isolation.

You are invited to this event because of your *involvement with* (or concern about, or knowledge about) seniors and elders. Please come to share your ideas about how we can prevent or reduce social isolation in our community!

Time:
Date:
Location:
Cost: free or $$

For more information, contact:

Notes

- *Italics* above—insert or substitute your information.
- You can ask people to RSVP by a certain date, especially if you are hosting a meal.
- If you are asking a specific person, or someone in a specific position, you could ask them to identify a substitute if they are not able to attend.
- In full day event state whether or not lunch is included.
- If there is a cost, provide instructions for how to pay.
- Parking details and a map with directions to the location are helpful.

Appendix E Key Presentation Slides

This is suggested content for presentation slides at ideas-exchange events. Presenters must have knowledge of the issue to expand on points. Organizers can supplement these slides by preparing their own talk with the appropriate content and slides.

Slide 1 What is social isolation?

Low quantity and quality of contact with others. A situation of social isolation involves few social contacts and few social roles, as well as the absence of mutually rewarding relationships.

Slide 2 Effects of social isolation or exclusion

- increased chance of premature death;
- lower sense of well-being;
- more depression;
- more disability from chronic diseases;
- poor mental health;
- increased use of health and support services;
- reduced quality of life;
- caregiver burden;
- poor general health; and
- inability to participate in and contribute to the community.

Slide 3

What are the risk factors?

- living alone;
- being age 80 or older;
- having compromised health status, including multiple chronic health problems;
- having no children or contact with family;
- experiencing critical life transitions (e.g. death of spouse, divorce);
- lacking access to transportation;
- having a low income;
- changing family structures;
- younger people moving away for work; and
- location of residence (e.g. urban, rural and remote).

Slide 4

Addressing social isolation through social innovation

Social Innovation is an intentional way that community organizations, governments, academics, seniors and businesses work together and combine resources to address the social isolation of seniors. Socially innovative solutions are characterized by drawing on funds, expertise and assets, strong community partnerships and shared risks and benefits. This approach focuses on shared results and concrete outcomes.

Slide 5 Core Principles of Social Innovation

- Cultivating and committing to coordinated efforts tailored to the needs of the community;
- Welcoming new partners across sectors to create a web of community interventions that support each other, building from strengths (e.g. aligning existing assets, programs, initiatives, funding, expertise and experience);
- Adapting activities to new groups;
- Drawing on the expertise and resources of other sectors (business, community, citizens and governments);
- Adopting an entrepreneurial approach to achieving sustainability and scale;
- Linking solutions to changing attitudes and behaviours to structural, institutional and systemic change; and
- Using new technologies.

Slide 6 Example of a socially innovative approach to social isolation

Traditionally, social isolation is addressed within the health and social service sector, which tends to result in projects at the individual level (e.g. friendly visiting programs). While these are important, non-traditional partners can give a broader perspective and different approaches to help social inclusion. For example, in one community a multi-sectoral and cross-sectoral partnership that included business (chamber of commerce, a shopping centre, Canadian Association of Pre-Retirement Planners), seniors' organizations (The Older Adult Centre, Retired Teachers Association) and municipal government (Mayor and City Council's Committee on Senior Issues), focussed on increasing seniors' participation and inclusion in the community by making businesses more age-friendly. Together they started the Friendly to Seniors Program, to assess local businesses in the areas of senior friendliness, resources, awareness literature and suggestions for improvements. Participating businesses receive the Friendly to Seniors Certificate. The expertise and resources of a variety of sectors brought a lot of helpful ideas (about risks, benefits and possible results) to this project.

Appendix F Event Feedback Form

Date: ____________________ **Location:** ______________________________________

Affiliation: *(Check all that apply)*

☐ Public ☐ Private ☐ Non-profit ☐ Academic ☐ Other (e.g. senior, citizen)

Please indicate how much you agree with the following statements by circling your response using this scale: 1 = strongly disagree, 5 = strongly agree.

1.	The purpose and objectives of the meeting were clear.	1	2	3	4	5
2.	Adequate background information was provided.	1	2	3	4	5
3.	We shared decision-making at this meeting.	1	2	3	4	5
4.	I found the activities useful.	1	2	3	4	5
5.	I was encouraged to participate and express my views.	1	2	3	4	5
6.	Overall, the discussion remained focused and on track.	1	2	3	4	5
7.	I now know more about social isolation.	1	2	3	4	5
8.	I now know more about social innovation.	1	2	3	4	5
9.	I can see ways to apply the principles of social innovation in my community.	1	2	3	4	5
10.	I strengthened connections or made new ones.	1	2	3	4	5
11.	The time of the meeting was convenient for me.	1	2	3	4	5
12.	The place of the meeting was convenient for me.	1	2	3	4	5
13.	I am leaving today’s meeting feeling positive and inspired.	1	2	3	4	5

Name two aspects of this event that were particularly valuable to you.

How could this event improve?

Other comments:

Appendix G Reporting Template

After the event, write a report to find the strengths to build on and the limitations to address for future events. The report can contain information from observing at the event, by reviewing materials developed by groups (like flip charts and notes) and from feedback forms. Facilitators usually write the event report for organizers. You can use your own format or follow this one:

- **Introduction**
- **Participants**

  How many people attended? From what sectors? Organizations (if known)?
- **Purpose of the event**

  What was the event intended to accomplish? To what degree was the purpose achieved or assessed? The facilitator and organizers who attended can debrief and review feedback on the event.
- **Key points**
  1. **Presentation**
     Describe the presentation. Did it meet the goals? Was the audience engaged? Review participant feedback.
  2. **Activities**
     For each activity:
     - Describe the purpose. Were the purposes achieved? Were participants engaged?
     - Describe the outcomes from each activity. For example, for the partial-day event, did groups carry out analysis of case study using principles of social innovation? Give examples of what group reporters shared. For a one-day event, did groups identify current and potential partnerships? Did participants express commitment to a second day event? If not, why not?
     - Use notes from group secretaries, flip charts and other materials for information.

3. **Overall**

   Review feedback to determine:
   - Did participants leave knowing more about social isolation? About social innovation?
   - Were connections strengthened or new ones developed?
4. **Summary of feedback**
   - Compute scores from completed forms and record these, question by question.
   - Summarize responses about strengths and limitations of the event (the last three questions).
5. **Note any changes that should be made for next event.**

Appendix H Other Resources

- **Report on the Social Isolation of Seniors,** published by the National Seniors Council and based on consultation with over 300 stakeholders, including seniors, community organizations, and researchers. The Report presents key findings from their research and makes recommendations to the federal government for reducing social isolation among seniors. (**www.seniorscouncil.gc.ca/eng/research_publications/social_isolation/page00.shtml**)
- National Seniors Council's **Scoping Review of the Literature: Social Isolation of Seniors, 2013–2014** involved a systematic selection, collection and summarization of existing knowledge relating to the social isolation of seniors in broad thematic areas to identify which were well covered and where there were gaps. (**www.seniorscouncil.gc.ca/eng/research_publications/scoping_social_isolation/page00.shtml**)
- **Campaign to End Loneliness: Connections in Older Age** is a United Kingdom initiative. A wide range of publications and resources pull together academic evidence, as well as examples of good practice. They include information about how government officials can address loneliness in their constituency, how local campaigners can raise awareness of the issue, essays from noted academics and practical examples of how organizations across the country have addressed loneliness locally. (**www.campaigntoendloneliness.org/resources/**)
- **Belonging: Exploring Connection to Community.** This report, based on a survey, looks at Canadians' sense of belonging and where we as communities and as a country are headed. It gives a snapshot of what contributes to connectedness to community, benefits and risks related to connectedness and makes comparisons from over past 50 years. (**http://communityfoundations.ca/resources/vital-signs-belonging-exploring-connection-to-community-2015/**)

- **Tamarack** is a charity that develops and supports learning communities to help people collaborate and to co-generate knowledge that solves complex community challenges. Among other information they provide resources to better understand the collective impact approach, assess readiness to use the approach, and apply the collective impact approach to existing collaborative efforts. (**tamarackcommunity.ca**)
- **Innoweave** helps organizations to understand, assess, test and implement innovative approaches to increase their impact. Their objective is to provide community leaders with new tools and processes to increase organizations' capacity for social innovation and to effect large-scale change. (**www.innoweave.ca/en/about**)
- **Liberating Structures'** website offers new and unique ways to approach and design how people work together. It provides 33 exercises with detailed instructions. (**www.liberatingstructures.com/**)
- The **Age-Friendly Communities** website provides tools and resources to help guide communities towards developing solutions to become more age friendly in a way that best suits a community's unique needs. (**http://afc.uwaterloo.ca/index.html**)
- **Age-Friendly Communities in Canada: Community Implementation Guide and Toolbox** was developed by the Nova Scotia Centre on Aging, Mount Saint Vincent University and the Public Health Agency of Canada (PHAC). It is one of the resources developed by PHAC to help communities start, implement and evaluate age-friendly initiatives. (**www.msvu.ca/site/media/msvu/AFC%20Implementation%20Toolbox%20ENG%20Nov%202012.pdf**)
- **The Age-Friendly Community Planning Guide** provides advice to municipalities on the development, implementation and evaluation of plans for senior-friendly communities which are socially and physically accessible and inclusive. (**www.seniors.gov.on.ca/en/afc/guide.php**)

- **The Age-Friendly Community Planning Outreach Initiative** was established by the Ontario Seniors' Secretariat to offer help to Ontario communities in the planning process. This project includes the development of partnerships, online resources and the creation of a network of knowledge. (**www.agefriendlyontario.ca/**)
- **The J.W. McConnell Family Foundation** offers support to organizations that are looking to consolidate or scale their own innovative approaches through the Social Innovation Fund. The Fund has three components – one for early stage innovations; a second for scaling up successful social innovations and for mature organizations diversifying program and business models; and a third for multi-sector collaborations, including "change labs". (**www.mcconnellfoundation.ca/en/programs/social-innovation-generation**)
- **Report of a meeting of experts on social isolation** to identify factors contributing to social isolation among older Canadians, and to provide recommendations relative to isolation to the F/P/T working group.
  - Hall, M. (2004). Report on the Federal/Provincial/Territorial expert consultation: Workshop on social isolation and seniors. Winnipeg, Manitoba.

Documents prepared for the Federal/Provincial/ Territorial Committee of Officials (Seniors)

- **Literature review** outlining the key issues regarding social isolation facing senior
  - B.C. Ministry of Health of Health, Children's, Women's and Senior's Health Branch (2004). Social Isolation Among Seniors: An Emerging Issue.
- **A profile of social isolation in Canada.** Drawing on the National Population Health Survey, these two research reports explain the characteristics of older Canadians who are more or less at risk of social isolation.
  - Keefe, J., Fancey, P., Andrew, M., and Hall, M. (2006). A profile of social isolation in Canada. Prepared for Federal/Provincial/ Territorial Committee of Officials (Seniors).
  - Keefe, J. & Fancey, P. (2007). A Profile of Social Isolation in Canada: Phase 2, Final Report. Prepared for the Federal/Provincial/Territorial Working Group on Social Isolation.
- **Review of Federal/Provincial/Territorial services and policies: An analysis of impact on social isolation.** This research, uses examples from F/P/T officials, scanned services and policies to identify positive effects on social isolation.
  - MacCourt, P. (2007). Review of Federal/Provincial/Territorial services and policies: An analysis of impact on social isolation. Prepared for Federal/ Provincial/Territorial Committee of Officials (Seniors).