Establishing working groups

1. **Introduce yourselves. Then, pick a notetaker** who will be responsible for writing down the group's responses on this worksheet.

2. **On a sheet of paper, make sure everyone writes:**
   - Name
   - Organization
   - Contact information

3. **Determine your communication preferences and how often you'll check in with each other.** This will help the working group hold each other accountable.

How will the group communicate?

- [ ] In-person meeting
- [ ] Conference call
- [ ] Email
- [ ] Other method: ____________________

How often will working group members share updates and progress toward goals?

- [ ] Weekly
- [ ] Monthly
- [ ] Other: ____________________

4. **Create a name for your working group.**

   Use simple and specific language to create a name that is easy to spell and pronounce.

Working group name is....

Plan your working group goal

1. **Before the group selects its goal, it can be helpful for each member to think about who the working group should serve and what impact it should have on the community.**
   - Share the questions with the group.
   - Set a timer for 10 minutes and ask each member to answer them individually on a sheet of paper.
   - Discuss your answers as a group.
   - Write down the top takeaways from each question below.

Questions
What need should the working group address?
What should the working group accomplish through its activities?
What populations or stakeholder groups should the working group serve?
How can the working group serve them?

2. Select a goal the working group wants to achieve.

You can look at the sample working goals on the next page to help the group brainstorm.

Working group goal is....

3. Make an action plan for achieving this goal.

Consider:

- The specific steps the group can take to achieve the goal
- The people, organizations, and tools that will help the group reach the goal
- The timeline to meet the goal

Steps	Resources needed	Task owner	Completion date
1.			
2.			
3.			
4.			
5.			

Sample working group goals

General

- Improve prevention, detection, reporting of, and response to elder financial exploitation
- Reduce elder exploitation, fraud, scams, and identity theft
- Establish a continuous 12-month schedule for trainings and meeting activities
- Select and retain effective network leadership

Cross-Training

- Develop role-specific professional training for financial institutions, attorneys, healthcare professionals, and social services providers
- Create a referral guide of network members that includes each member's organization and its role
- Secure funding to hold a day-long training for criminal justice professionals
- Encourage banker's association to provide ongoing training for financial professionals
- Host annual conference to share promising practices, case studies, and innovation
- Develop a common understanding of how different disciplines define "capacity"

Community Education & Outreach

- Develop and implement fraud prevention education for seniors and caregivers
- Distribute educational materials to senior centers, senior living communities, financial institutions, medical offices, libraries, and other locations
- Develop public service announcements to be broadcast

Case Review & Resolution

- Implement a confidentiality protocol for network members to use during case review
- Establish a working relationship with the local district attorney's office
- Advocate for the assignment of a deputy district attorney to regularly meet with APS to refer cases for criminal prosecution
- Law enforcement members to identify local or regional SAR review team and collaborate with State Elder Justice Coordinators/agency liaison to review SARs filed by BSA filers.

Policy Development

- Encourage community leaders to prioritize issue of elder financial exploitation
- Support state funding for agencies addressing elder financial exploitation
- Advocate for the creation of safe, accessible shelters for older adults experiencing domestic violence