Elder Wellbeing Index Calculator

Comprehensive Elder Thriving Assessment Tool

Version: 1.0 (2025-06-04)
Purpose: Enable elder communities to measure and track comprehensive wellbeing across four core dimensions
Assessment Time: 45-60 minutes for complete evaluation
Format: Elder-led self-assessment with community comparison and progress tracking

Section 1: Purpose Score Assessment

1.1 Meaningful Activity Engagement

Current Activity Assessment

Weekly Activity Hours (Rate your typical week):

Work and Economic Contribution:

- Paid employment (part-time, consulting, business): _____ hours/week
- Volunteer work with organizations: _____ hours/week
- Innovation hub or community problem-solving: _____ hours/week
- Small business or entrepreneurship: _____ hours/week

Care and Support Contributions:

- Family caregiving (children, grandchildren, spouse/partner): _____ hours/week
- Elder peer care and support: _____ hours/week
- Community mutual aid and neighbor support: _____ hours/week
- Informal community caregiving: _____ hours/week

Knowledge and Wisdom Sharing:

- Formal teaching or training: _____ hours/week
- Mentorship and guidance (formal and informal): _____ hours/week
- Cultural knowledge transmission and preservation: _____ hours/week
- Professional consultation or advice: _____ hours/week

Community and Civic Engagement:

- Community organizing and advocacy: _____ hours/week
- Civic participation (meetings, committees, boards): _____ hours/week
- Cultural and religious community service: _____ hours/week
- Environmental stewardship and climate activities: _____ hours/week

Total Weekly Activity Hours: _____ hours **Activity Engagement Score**:

- 40+ hours/week = 20 points
- 30-39 hours/week = 16 points
- 20-29 hours/week = 12 points
- 10-19 hours/week = 8 points
- 5-9 hours/week = 4 points
- 0-4 hours/week = 0 points

Activity Meaning and Satisfaction

Personal Meaning Assessment (Rate 1-5, 5 = highest):

Activity Value and Satisfaction:

- My activities feel meaningful and worthwhile: _____/5
- I look forward to my regular activities: _____/5
- My activities use my skills and experience: _____/5
- I feel energized rather than drained by my activities: _____/5
- My activities align with my values and priorities: _____/5

Community Impact and Recognition:

- My activities make a positive difference in my community: _____/5
- Others recognize and appreciate my contributions: _____/5
- My work helps solve problems or meets community needs: _____/5
- I see concrete results from my efforts and activities: _____/5
- My activities contribute to something larger than myself: _____/5

Personal Growth and Challenge:

- My activities provide opportunities to learn new things: _____/5
- I face appropriate challenges that engage my abilities: _____/5
- My activities enable me to develop new skills or knowledge: _____/5
- I have opportunities to be creative and innovative: _____/5
- My activities help me grow as a person: _____/5

Activity Meaning Subtotal: _____/75 points

Convert to Purpose Score Points:

- 65-75 points = 15 points
- 55-64 points = 12 points
- 45-54 points = 9 points
- 35-44 points = 6 points
- 25-34 points = 3 points
- Below 25 points = 0 points

1.2 Goal Achievement and Future Planning

Personal Goal Assessment

Life Goals and Aspirations (Rate progress 1-5, 5 = excellent progress):

Personal Development Goals:

- Learning new skills or knowledge: _____/5
- Maintaining and improving health and fitness: _____/5
- Developing creative abilities or artistic expression: _____/5
- Spiritual or personal growth: _____/5
- Travel or new experience goals: _____/5

Relationship and Family Goals:

- Strengthening family relationships: _____/5
- Building new friendships and social connections: _____/5
- Improving existing relationships: _____/5
- Connecting with younger generations: _____/5
- Creating or strengthening community relationships: _____/5

Contribution and Legacy Goals:

- Making a positive difference in my community: _____/5
- Sharing my knowledge and experience with others: _____/5
- Contributing to causes I care about: _____/5
- Creating a positive legacy for future generations: _____/5
- Documenting or preserving important knowledge or memories: _____/5

Independence and Security Goals:

- Maintaining independence and autonomy: _____/5
- Achieving or maintaining financial security: _____/5
- Creating a safe and comfortable living environment: _____/5
- Planning for future care and support needs: _____/5
- Maintaining control over important life decisions: _____/5

Goal Achievement Subtotal: _____/100 points

Convert to Purpose Score Points:

- 85-100 points = 10 points
- 70-84 points = 8 points
- 55-69 points = 6 points
- 40-54 points = 4 points
- 25-39 points = 2 points
- Below 25 points = 0 points

1.3 Innovation and Problem-Solving Participation

Community Innovation Assessment

Innovation and Problem-Solving Activities (Check all that apply, assign points):

Innovation Hub and Community Problem-Solving:

- ☐ Regular participation in Elder Innovation Hub activities (5 points)
- ☐ Leadership role in community problem-solving projects (5 points)
- ☐ Development of innovations or solutions to community challenges (5 points)
- ☐ Mentoring other elders in innovation or problem-solving (3 points)
- ☐ Testing and providing feedback on community innovations (3 points)

Business and Economic Innovation:

- ☐ Starting or participating in elder-led business creation (5 points)
- ☐ Developing new approaches to elder economic participation (4 points)
- ☐ Creating or improving services for elder community (4 points)
- ☐ Participating in cooperative business development (3 points)
- ☐ Innovation in personal financial management or security (2 points)

Social and Community Innovation:

- ☐ Creating new programs or services for elder community (5 points)
- ☐ Developing solutions to social isolation or community connection (4 points)
- ☐ Innovation in intergenerational programming or relationships (4 points)
- ☐ Creating new approaches to mutual aid and community support (3 points)
- ☐ Developing cultural programming or community events (3 points)

Technology and Communication Innovation:

- ☐ Developing or improving technology solutions for elders (5 points)
- ☐ Creating new approaches to elder-friendly technology use (4 points)
- ☐ Innovation in elder community communication and organizing (3 points)
- ☐ Developing training or support for elder technology use (3 points)
- ☐ Adapting technology for cultural or accessibility needs (2 points)

Innovation Participation Score: _____/25 points (maximum)

Purpose Score Calculation

Activity Engagement: _____ points (max 20) **Activity Meaning**: _____ points (max 15)
Goal Achievement: _____ points (max 10) **Innovation Participation**: _____ points (max 25)

Total Purpose Score: _____/70 points

Purpose Score Interpretation:

- 60-70 points: **Thriving** - High purpose with meaningful activity and community contribution
- 45-59 points: **Engaged** - Good purpose with active community participation
- 30-44 points: **Developing** - Moderate purpose with opportunities for increased engagement
- 15-29 points: **Emerging** - Limited purpose, significant opportunities for activity development
- 0-14 points: **Concerning** - Very limited purpose, immediate support and opportunities needed

Section 2: Connection Index Assessment

2.1 Social Network Quality and Diversity

Relationship Assessment

Family and Close Relationships (Rate quality 1-5, 5 = excellent):

Immediate Family Relationships:

- Spouse or life partner relationship quality: _____/5 (or N/A)
- Adult children relationship quality: _____/5 (or N/A)
- Grandchildren relationship quality: _____/5 (or N/A)
- Sibling relationship quality: _____/5 (or N/A)
- Other important family relationship quality: _____/5 (or N/A)

Close Friendship and Social Relationships:

- Close friends I can confide in: _____/5
- Friends I socialize with regularly: _____/5
- Neighbors I have meaningful relationships with: _____/5
- Community members I feel connected to: _____/5
- People who understand and appreciate me: _____/5

Family Relationship Subtotal: _____/25 points (adjust if N/A responses) **Friendship Subtotal**: _____/25 points

Social Network Size and Frequency

Social Contact Frequency (Average per month):

Regular Social Interactions:

- In-person visits with family members: _____ times/month
- In-person visits with friends and neighbors: _____ times/month
- Phone or video calls with family and friends: _____ times/month

- Community event attendance and participation: _____ times/month
- Group activities (religious, cultural, recreational): _____ times/month

Contact Frequency Scoring:

- In-person family visits: 8+ = 5 pts, 4-7 = 4 pts, 2-3 = 3 pts, 1 = 2 pts, 0 = 0 pts
- In-person friend visits: 8+ = 5 pts, 4-7 = 4 pts, 2-3 = 3 pts, 1 = 2 pts, 0 = 0 pts
- Phone/video contact: 12+ = 5 pts, 8-11 = 4 pts, 4-7 = 3 pts, 1-3 = 2 pts, 0 = 0 pts
- Community events: 8+ = 5 pts, 4-7 = 4 pts, 2-3 = 3 pts, 1 = 2 pts, 0 = 0 pts
- Group activities: 8+ = 5 pts, 4-7 = 4 pts, 2-3 = 3 pts, 1 = 2 pts, 0 = 0 pts

Contact Frequency Score: _____/25 points

2.2 Intergenerational Connection and Community Participation

Cross-Age Relationships

Intergenerational Relationship Assessment (Rate 1-5, 5 = excellent):

Family Intergenerational Connections:

- Regular meaningful contact with adult children: _____/5
- Positive relationships with grandchildren or young family members: _____/5
- Mutual support and assistance with younger family members: _____/5
- Shared activities and interests across generations in family: _____/5
- Feeling valued and respected by younger family members: _____/5

Community Intergenerational Connections:

- Meaningful relationships with people 20+ years younger: _____/5
- Opportunities to mentor or guide younger community members: _____/5
- Participation in intergenerational community activities: _____/5
- Collaboration with younger generations on community projects: _____/5
- Mutual learning and knowledge sharing across age groups: _____/5

Intergenerational Connection Score: _____/50 points

Community Involvement and Civic Participation

Community Participation Assessment (Rate involvement level 1-5):

Civic and Political Engagement:

- Voting and election participation: _____/5
- Community meeting and forum attendance: _____/5
- Advocacy and organizing for community issues: _____/5
- Service on boards, committees, or community groups: _____/5
- Engagement with local government and elected officials: _____/5

Cultural and Religious Community Participation:

- Participation in cultural community events and organizations: _____/5
- Religious or spiritual community involvement: _____/5
- Cultural tradition preservation and transmission activities: _____/5
- Community celebration and festival participation: _____/5
- Leadership roles in cultural or religious community: _____/5

Neighborhood and Local Community Engagement:

- Regular interaction with neighbors: _____/5

- Participation in neighborhood improvement or organizing: _____/5
- Local business and economic community engagement: _____/5
- Mutual aid and community support network participation: _____/5
- Knowledge of and connection to local community resources: _____/5

Community Participation Score: _____/75 points

2.3 Loneliness Prevention and Social Support

Isolation and Loneliness Assessment

Social Connection and Loneliness (Rate 1-5, 1 = never, 5 = very often):

Negative Social Connection Indicators (Reverse scoring):

- I feel lonely even when I'm with other people: _____/5
- I feel isolated from others in my community: _____/5
- I have no one to turn to when I need help or support: _____/5
- I feel like no one really understands me: _____/5
- I feel disconnected from my family and friends: _____/5

Positive Social Connection Indicators (Standard scoring):

- I have people I can depend on for emotional support: _____/5
- I feel like an important part of my community: _____/5
- I have meaningful conversations with others regularly: _____/5
- People seek out my company and enjoy spending time with me: _____/5
- I feel connected to and valued by the people around me: _____/5

Social Support Scoring:

- Negative indicators: Reverse score (5=1, 4=2, 3=3, 2=4, 1=5), then sum: _____/25
- Positive indicators: Standard score, sum: _____/25

Social Support Score: _____/50 points

Connection Index Calculation

Relationship Quality: _____/50 points (Family + Friendship scores) **Contact Frequency**: _____/25 points **Intergenerational Connection**: _____/50 points **Community Participation**: _____/75 points **Social Support**: _____/50 points

Total Connection Index: _____/250 points

Convert to Standard Scale:

- 215-250 points = 100 points: **Highly Connected**
- 175-214 points = 80 points: **Well Connected**
- 135-174 points = 60 points: **Moderately Connected**
- 95-134 points = 40 points: **Somewhat Isolated**
- 55-94 points = 20 points: **Isolated**
- 0-54 points = 0 points: **Severely Isolated**

Connection Index Final Score: _____/100 points

Section 3: Agency Measure Assessment

3.1 Decision-Making Autonomy and Control

Personal Autonomy Assessment

Daily Life Decision-Making (Rate control level 1-5, 5 = complete control):

Living Situation and Environment:

- Where I live and housing arrangements: _____/5
- How my living space is organized and decorated: _____/5
- Who I live with or near: _____/5
- Daily schedule and routine: _____/5
- Personal care and grooming decisions: _____/5

Social and Relationship Decisions:

- Who I spend time with socially: _____/5
- What activities and events I participate in: _____/5
- How I communicate with family and friends: _____/5
- What level of family involvement I want in my life: _____/5
- Personal boundaries and privacy: _____/5

Lifestyle and Personal Choices:

- What I eat and when I eat: _____/5
- How I spend my leisure time: _____/5
- What I wear and personal style choices: _____/5
- Travel and transportation decisions: _____/5
- Personal values and belief expression: _____/5

Personal Autonomy Score: _____/75 points

Healthcare and Care Decision-Making

Healthcare Autonomy Assessment (Rate control level 1-5):

Medical Decision-Making:

- Choice of healthcare providers and specialists: _____/5
- Medical treatment decisions and informed consent: _____/5
- Medication decisions and management: _____/5
- Healthcare appointment scheduling and attendance: _____/5
- Access to medical information and records: _____/5

Care and Support Decisions:

- What kind of care or assistance I receive: _____/5
- Who provides care or assistance to me: _____/5
- When and how care is provided: _____/5
- Personal care and hygiene assistance decisions: _____/5
- Care location and setting preferences: _____/5

End-of-Life and Future Planning:

- Advanced directive and end-of-life care decisions: _____/5
- Future living arrangement planning: _____/5
- Legacy and inheritance decisions: _____/5
- Family involvement in future care decisions: _____/5
- Healthcare proxy and decision-making authority: _____/5

Healthcare Autonomy Score: _____/75 points

3.2 Financial Independence and Control

Economic Security and Control

Financial Decision-Making (Rate control level 1-5):

Income and Economic Participation:

- Control over sources of income: _____/5
- Decisions about work and economic activity: _____/5
- Control over AUBI participation and recognition: _____/5
- Ability to earn additional income if desired: _____/5
- Economic independence from family financial support: _____/5

Spending and Budget Control:

- Daily spending decisions and purchases: _____/5
- Major purchase decisions and timing: _____/5
- Budget planning and financial management: _____/5
- Bill paying and financial responsibility management: _____/5
- Discretionary spending for enjoyment and interests: _____/5

Financial Planning and Security:

- Savings and investment decisions: _____/5
- Insurance and financial protection decisions: _____/5
- Estate planning and inheritance decisions: _____/5
- Financial emergency planning and response: _____/5
- Long-term financial security planning: _____/5

Financial Independence Score: _____/75 points

3.3 Technology Choice and Digital Autonomy

Technology Autonomy Assessment

Technology Choice and Control (Rate control level 1-5):

Technology Use Decisions:

- Whether to use technology for daily activities: _____/5
- What types of technology to use or avoid: _____/5
- How much technology to integrate into daily life: _____/5
- Learning pace and technology adoption timing: _____/5
- Technology assistance and support preferences: _____/5

Digital Privacy and Security Control:

- Personal information sharing and privacy settings: _____/5
- Control over digital communication and contact: _____/5
- Data collection and use consent decisions: _____/5
- Social media and online presence choices: _____/5
- Digital security and protection decisions: _____/5

Alternative Access and Choice Protection:

- Access to non-digital alternatives for services: _____/5
- No penalties for choosing non-digital options: _____/5
- Ability to modify or stop technology use: _____/5
- Support for technology choices without pressure: _____/5
- Respect for technology comfort level and preferences: _____/5

Technology Autonomy Score: ____/75 points

3.4 Community and Political Participation

Civic Agency Assessment

Community Participation Control (Rate influence level 1-5):

Community Decision-Making Participation:

- Participation in community meetings and forums: ____/5
- Input in community decisions affecting elders: ____/5
- Leadership roles in community organizations: ____/5
- Influence on community resource allocation: ____/5
- Voice in community planning and development: ____/5

Political Engagement and Influence:

- Voting and election participation: ____/5
- Contact and communication with elected officials: ____/5
- Advocacy for issues important to me: ____/5
- Participation in political organizing and campaigns: ____/5
- Influence on policies affecting elders and aging: ____/5

Cultural and Social Community Leadership:

- Leadership in cultural or religious community: ____/5
- Influence on family decisions and planning: ____/5
- Mentorship and guidance role with others: ____/5
- Recognition as community elder and wisdom keeper: ____/5
- Authority in areas of expertise and experience: ____/5

Civic Agency Score: ____/75 points

Agency Measure Calculation

Personal Autonomy: ____/75 points **Healthcare Autonomy**: ____/75 points **Financial Independence**: ____/75 points **Technology Autonomy**: ____/75 points **Civic Agency**: ____/75 points

Total Agency Measure: ____/375 points

Convert to Standard Scale:

- 320-375 points = 100 points: **High Agency**
- 260-319 points = 80 points: **Good Agency**
- 200-259 points = 60 points: **Moderate Agency**
- 140-199 points = 40 points: **Limited Agency**
- 80-139 points = 20 points: **Low Agency**
- 0-79 points = 0 points: **Very Low Agency**

Agency Measure Final Score: ____/100 points

Section 4: Wisdom Utilization Assessment

4.1 Community Recognition and Expertise Application

Knowledge Recognition Assessment

Professional and Life Experience Recognition (Rate recognition level 1-5):

Professional Expertise Recognition:

- Community recognition of my professional skills and knowledge: _____/5
- Opportunities to use professional expertise in community activities: _____/5
- Requests for advice or consultation in my areas of expertise: _____/5
- Leadership roles based on professional experience: _____/5
- Teaching or training opportunities using professional knowledge: _____/5

Life Experience and Wisdom Recognition:

- Community appreciation for my life experience and perspective: _____/5
- Others seeking my advice on important life decisions: _____/5
- Recognition of my cultural knowledge and traditions: _____/5
- Acknowledgment of my historical knowledge and memory: _____/5
- Respect for my practical life skills and capabilities: _____/5

Problem-Solving and Decision-Making Inclusion:

- Inclusion in community problem-solving and planning: _____/5
- Consultation on family decisions and planning: _____/5
- Input sought on community challenges and solutions: _____/5
- Participation in policy discussions affecting community: _____/5
- Recognition of my analytical and decision-making abilities: _____/5

Expertise Recognition Score: _____/75 points

4.2 Mentorship and Knowledge Transmission

Teaching and Mentorship Assessment

Formal and Informal Teaching (Rate activity level 1-5):

Skills and Knowledge Teaching:

- Teaching practical skills to younger generations: _____/5
- Sharing professional knowledge and expertise: _____/5
- Training others in areas of competence: _____/5
- Formal education or workshop leadership: _____/5
- Informal daily teaching and guidance: _____/5

Mentorship and Guidance Relationships:

- Ongoing mentorship relationships with younger people: _____/5
- Guidance and advice giving to family members: _____/5
- Support and coaching for community members: _____/5
- Career and life guidance for others: _____/5
- Emotional support and wisdom sharing: _____/5

Cultural and Traditional Knowledge Transmission:

- Teaching cultural traditions and practices: _____/5
- Sharing family history and stories: _____/5
- Language teaching and preservation: _____/5
- Cultural skill and art form teaching: _____/5
- Community history and memory preservation: _____/5

Knowledge Transmission Score: _____/75 points

4.3 Innovation and Community Contribution

Innovation and Problem-Solving Application

Community Innovation Contribution (Rate contribution level 1-5):

Innovation Development and Leadership:

- Leading innovation projects using my experience and knowledge: _____/5
- Developing new solutions to community challenges: _____/5
- Creating new programs or services for community benefit: _____/5
- Business development and entrepreneurship using my expertise: _____/5
- Technology innovation and adaptation for elder community: _____/5

Community Development and Improvement:

- Contributing to community planning and development: _____/5
- Organizing and leading community improvement projects: _____/5
- Developing community resources and support systems: _____/5
- Creating cultural programming and community events: _____/5
- Building partnerships and collaborations for community benefit: _____/5

Environmental and Climate Wisdom Application:

- Sharing environmental knowledge and observations: _____/5
- Contributing to community climate adaptation planning: _____/5
- Leading environmental stewardship and protection activities: _____/5
- Teaching traditional ecological knowledge and practices: _____/5
- Documenting environmental changes and community resilience: _____/5

Innovation Contribution Score: _____/75 points

4.4 Policy Influence and Community Leadership

Community Leadership and Policy Influence

Policy and Decision-Making Influence (Rate influence level 1-5):

Community Policy Influence:

- Input on community policies affecting elders: _____/5
- Participation in community planning and resource allocation: _____/5
- Leadership in community governance and decision-making: _____/5
- Advocacy for community needs and priorities: _____/5
- Influence on community service delivery and quality: _____/5

Political and Civic Leadership:

- Influence on local government policies and decisions: _____/5
- Leadership in political organizing and advocacy: _____/5
- Participation in civic boards, committees, and commissions: _____/5
- Electoral influence and candidate support: _____/5
- Policy development and legislative advocacy: _____/5

Cultural and Social Leadership:

- Leadership in cultural and religious community: _____/5
- Influence on family decisions and traditions: _____/5
- Leadership in intergenerational programs and activities: _____/5

- Authority in conflict resolution and community mediation: _____/5
- Recognition as community elder and wisdom keeper: _____/5

Policy Influence Score: _____/75 points

Wisdom Utilization Calculation

Expertise Recognition: _____/75 points **Knowledge Transmission**: _____/75 points **Innovation Contribution**: _____/75 points **Policy Influence**: _____/75 points

Total Wisdom Utilization: _____/300 points

Convert to Standard Scale:

- 260-300 points = 100 points: **High Wisdom Utilization**
- 210-259 points = 80 points: **Good Wisdom Utilization**
- 160-209 points = 60 points: **Moderate Wisdom Utilization**
- 110-159 points = 40 points: **Limited Wisdom Utilization**
- 60-109 points = 20 points: **Low Wisdom Utilization**
- 0-59 points = 0 points: **Very Low Wisdom Utilization**

Wisdom Utilization Final Score: _____/100 points

Section 5: Elder Wellbeing Index Calculation and Interpretation

5.1 Comprehensive Wellbeing Score Calculation

Final Index Calculation

Individual Dimension Scores:

- **Purpose Score**: _____/70 points
- **Connection Index**: _____/100 points
- **Agency Measure**: _____/100 points
- **Wisdom Utilization**: _____/100 points

Weighted Scoring Options:

Option A: Equal Weighting (Recommended for most assessments):

- Purpose Score: _____ × 1.43 = _____ (convert to 100-point scale)
- Connection Index: _____ × 1.0 = _____
- Agency Measure: _____ × 1.0 = _____
- Wisdom Utilization: _____ × 1.0 = _____

Elder Wellbeing Index Total: _____/400 points **Average Score**: _____ ÷ 4 = _____/100 points

Option B: Community-Prioritized Weighting (Community determines priorities):

- Purpose Score Weight: ___% × Purpose Score: _____
- Connection Index Weight: ___% × Connection Index: _____
- Agency Measure Weight: ___% × Agency Measure: _____
- Wisdom Utilization Weight: ___% × Wisdom Utilization: _____ (Weights must total 100%)

Weighted Elder Wellbeing Index: _____/100 points

Dimension Balance Assessment

Wellbeing Balance Analysis:

- Highest scoring dimension: _____ (Score: _____)
- Lowest scoring dimension: _____ (Score: _____)

- Score difference between highest and lowest: _____ points
- Dimension balance rating:
  - 0-15 point difference: **Highly Balanced**
  - 16-25 point difference: **Well Balanced**
  - 26-35 point difference: **Moderately Balanced**
  - 36-45 point difference: **Somewhat Unbalanced**
  - 46+ point difference: **Significantly Unbalanced**

5.2 Wellbeing Level Interpretation and Action Planning

Overall Wellbeing Level Assessment

Elder Wellbeing Index Interpretation:

90-100 Points: THRIVING

- **Description**: Exceptional wellbeing across all dimensions with high purpose, strong connections, robust agency, and significant wisdom utilization
- **Community Role**: Model for other elders and leader in community wellbeing initiatives
- **Action Focus**: Maintaining wellbeing while supporting other elders and community development
- **Resource Needs**: Opportunities for continued growth and community contribution

75-89 Points: FLOURISHING

- **Description**: High wellbeing with strong performance in most dimensions and good overall life satisfaction
- **Community Role**: Active community participant and potential mentor for other elders
- **Action Focus**: Strengthening any lower-scoring dimensions while building on existing strengths
- **Resource Needs**: Opportunities for increased community leadership and wisdom sharing

60-74 Points: STABLE

- **Description**: Good wellbeing with adequate performance across dimensions and reasonable life satisfaction
- **Community Role**: Engaged community member with potential for increased participation
- **Action Focus**: Identifying specific areas for improvement while maintaining current strengths
- **Resource Needs**: Support for increased community engagement and personal development

45-59 Points: DEVELOPING

- **Description**: Moderate wellbeing with some challenges but foundation for improvement and growth
- **Community Role**: Community member with support needs and contribution potential
- **Action Focus**: Targeted improvement in lowest-scoring dimensions with community support
- **Resource Needs**: Enhanced community support, activity opportunities, and connection facilitation

30-44 Points: STRUGGLING

- **Description**: Below-average wellbeing with significant challenges in multiple dimensions requiring community support
- **Community Role**: Community member needing support while maintaining dignity and potential for contribution
- **Action Focus**: Immediate support for most challenging areas while building on any existing strengths

- **Resource Needs**: Comprehensive community support, mental health resources, and activity engagement

15-29 Points: AT RISK

- **Description**: Low wellbeing with serious challenges across multiple dimensions requiring urgent attention
- **Community Role**: Community member requiring immediate support and intervention
- **Action Focus**: Crisis intervention and intensive support while preserving elder dignity and choice
- **Resource Needs**: Emergency support services, mental health intervention, and comprehensive community wrap-around care

0-14 Points: CRISIS

- **Description**: Very low wellbeing indicating potential crisis requiring immediate comprehensive intervention
- **Community Role**: Community member in crisis requiring emergency support while maintaining human dignity
- **Action Focus**: Immediate crisis intervention with elder involvement in developing support plan
- **Resource Needs**: Emergency intervention, comprehensive support services, and long-term community care planning

Dimension-Specific Interpretation and Action Planning

Purpose Score Action Planning:

High Purpose (50-70 points):

- Maintain meaningful activities while avoiding overcommitment
- Consider mentoring other elders in activity development
- Explore opportunities for increased community leadership
- Document and share successful activity engagement approaches

Moderate Purpose (35-49 points):

- Identify new meaningful activities aligned with interests and values
- Connect with Elder Innovation Hubs or community organizations
- Develop skills or pursue interests that could become regular activities
- Seek mentorship from elders with high purpose scores

Low Purpose (20-34 points):

- Begin with small, manageable activities that provide immediate satisfaction
- Connect with community support for activity exploration and development
- Address barriers to activity participation (transportation, health, confidence)
- Focus on activities that use existing skills and interests

Very Low Purpose (0-19 points):

- Start with minimal commitment activities to build confidence
- Address any depression, health, or basic needs issues affecting activity participation
- Connect with peer support and community programs specifically designed for activity development
- Consider professional support for goal setting and activity planning

Connection Index Action Planning:

High Connection (80-100 points):

- Use social networks to support other elders with connection challenges
- Facilitate community connection activities and programming
- Maintain existing relationships while being open to new connections
- Model healthy relationship patterns for community

Moderate Connection (60-79 points):

- Strengthen existing relationships through more frequent and meaningful contact
- Explore new community activities and social opportunities
- Develop intergenerational relationships and mentorship opportunities
- Address any specific relationship challenges with support

Low Connection (40-59 points):

- Focus on developing one or two meaningful relationships before expanding social network
- Participate in structured community activities providing social interaction
- Address barriers to social connection (transportation, health, confidence, past conflicts)
- Consider community programs specifically designed for elder social connection

Very Low Connection (0-39 points):

- Begin with minimal social commitment activities to reduce isolation
- Address depression, anxiety, or other mental health issues affecting social connection
- Connect with community outreach and peer support programs
- Consider professional support for social skills development or relationship repair

Agency Measure Action Planning:

High Agency (80-100 points):

- Use decision-making authority to support other elders in developing autonomy
- Participate in community governance and policy development
- Advocate for elder rights and community self-determination
- Model autonomous decision-making for community

Moderate Agency (60-79 points):

- Identify specific areas where increased control and choice would improve wellbeing
- Develop skills and knowledge supporting independent decision-making
- Advocate for personal needs while building community support
- Gradually expand decision-making authority in comfortable areas

Low Agency (40-59 points):

- Focus on developing control in daily life decisions before addressing major life areas
- Build support networks that respect autonomy while providing assistance
- Address specific barriers to independent decision-making (health, finances, family dynamics)
- Connect with advocacy resources supporting elder rights and autonomy

Very Low Agency (0-39 points):

- Begin with small decisions and choices to build confidence in decision-making
- Address any abuse, exploitation, or inappropriate control by others
- Connect with elder rights advocacy and legal support if needed
- Build support network that prioritizes elder choice and dignity

Wisdom Utilization Action Planning:

High Wisdom Utilization (80-100 points):

- Expand opportunities for knowledge sharing and community leadership
- Mentor other elders in developing and sharing their expertise
- Document knowledge and experience for community benefit and legacy creation
- Participate in policy development and community decision-making

Moderate Wisdom Utilization (60-79 points):

- Identify additional opportunities to share knowledge and expertise
- Develop teaching, mentorship, or community leadership skills
- Connect with community organizations seeking elder expertise
- Explore innovation opportunities applying life experience to community challenges

Low Wisdom Utilization (40-59 points):

- Identify areas of knowledge and experience that could benefit others
- Start with informal knowledge sharing before pursuing formal opportunities
- Connect with community programs supporting elder expertise recognition
- Build confidence in the value of life experience and accumulated knowledge

Very Low Wisdom Utilization (0-39 points):

- Focus on recognizing personal knowledge and experience as valuable
- Begin with small opportunities to share knowledge in comfortable settings
- Address any feelings of inadequacy or devaluation of life experience
- Connect with peer support emphasizing elder wisdom and community value

5.3 Progress Tracking and Community Comparison

Individual Progress Monitoring

Progress Tracking System:

Assessment Schedule:

- **Baseline Assessment**: Initial comprehensive evaluation establishing starting point
- **3-Month Check-in**: Brief assessment focusing on lowest-scoring dimensions
- **6-Month Assessment**: Full assessment evaluating progress and identifying new goals
- **Annual Comprehensive Assessment**: Complete evaluation with goal setting for following year

Progress Measurement:

- **Dimension Improvement**: Track point increases in each dimension over time
- **Goal Achievement**: Monitor progress toward specific wellbeing goals set after baseline assessment
- **Life Changes**: Document major life changes affecting wellbeing (health, housing, relationships, activities)
- **Community Program Participation**: Track participation in AUBI, innovation hubs, and community programs

Progress Tracking Template:

| Assessment Date | Purpose Score | Connection Index | Agency Measure | Wisdom Utilization | Overall Score | Notes | |----------------|--------------|------------------|----------------|--------------------|--------------|-------| | Baseline: ____ | ____ | ____ | ____ | ____ | ____ | ____ | | 3-Month: ____ | ____ | ____ | ____ | ____ | ____ | ____ | | 6-Month: ____ | ____ | ____ | ____ | ____ | ____ | ____ | | 1-Year: ____ | ____ | ____ | ____ | ____ | ____ | ____ |

Community Wellbeing Assessment

Community-Level Data Collection:

Aggregate Community Wellbeing:

- **Community Average Scores**: Average Purpose, Connection, Agency, and Wisdom Utilization scores for all participating elders
- **Community Wellbeing Distribution**: Percentage of elders in each wellbeing level (Thriving, Flourishing, Stable, etc.)
- **Community Strengths and Challenges**: Dimensions where community performs well and areas needing improvement
- **Community Resource Needs**: Support services and programs needed based on assessment results

Demographic Analysis (Optional, with community consent):

- **Age Group Differences**: Wellbeing differences across age groups (55-64, 65-74, 75-84, 85+)
- **Cultural Community Variations**: Wellbeing differences across cultural and linguistic communities
- **Economic Status Correlations**: Relationship between economic circumstances and wellbeing scores
- **Geographic Variations**: Wellbeing differences across neighborhoods or community areas

Community Comparison Template:

Wellbeing Level	Number of Elders	Percentage	Priority Actions
Thriving (90-100)	_____	____%	Maintain and share success
Flourishing (75-89)	_____	____%	Support continued growth
Stable (60-74)	_____	____%	Opportunities for improvement
Developing (45-59)	_____	____%	Targeted support programs
Struggling (30-44)	_____	____%	Enhanced community support
At Risk (15-29)	_____	____%	Urgent intervention needed
Crisis (0-14)	_____	____%	Emergency support required

Section 6: Cultural Adaptation and Community Customization

6.1 Cultural Wellbeing Definitions and Adaptation

Indigenous and Traditional Community Adaptation

Traditional Wellbeing Concepts:

- **Interconnectedness**: Wellbeing defined through relationship to community, land, and cultural traditions
- **Spiritual Balance**: Integration of spiritual and cultural practices in wellbeing assessment
- **Generational Responsibility**: Wellbeing including responsibility to past ancestors and future generations
- **Land Connection**: Relationship to traditional territory and environmental stewardship as wellbeing component

Cultural Adaptation Options:

- **Traditional Knowledge Integration**: Include traditional knowledge sharing and cultural practice transmission in Purpose Score
- **Extended Family Connections**: Expand Connection Index to include extended family networks and community relationships
- **Cultural Decision-Making**: Adapt Agency Measure to include participation in traditional governance and cultural decisions
- **Elder Cultural Authority**: Strengthen Wisdom Utilization to reflect traditional elder roles and cultural leadership

Community Consultation Process:

- **Cultural Community Leadership**: Indigenous elder leadership in adapting assessment to cultural values
- **Traditional Protocol Respect**: Assessment adaptation following cultural protocols for elder consultation
- **Language Integration**: Assessment available in Indigenous languages with cultural concepts preserved
- **Community Ownership**: Indigenous community control over assessment data and interpretation

Immigrant and Refugee Community Adaptation

Cultural Value Integration:

- **Family Honor and Respect**: Wellbeing definitions including family relationships and cultural respect patterns
- **Cultural Preservation**: Purpose Score including cultural tradition maintenance and transmission
- **Transnational Connections**: Connection Index including relationships with family and community in countries of origin
- **Cultural Identity Expression**: Agency Measure including freedom to express cultural identity and practice traditions

Migration and Settlement Considerations:

- **Settlement Stress**: Recognition of unique challenges facing immigrant and refugee elders
- **Language and Communication**: Assessment accommodation for diverse language abilities and communication preferences
- **Documentation Status**: Assessment accessible regardless of immigration status with privacy protection
- **Cultural Community Leadership**: Immigrant elder leadership in community assessment adaptation

6.2 Economic and Social Context Adaptation

Economic Diversity Accommodation

Economic Circumstance Integration:

- **Fixed Income Considerations**: Assessment recognizing constraints and strengths of fixed-income circumstances
- **Wealth Diversity**: Assessment appropriate for elders across economic spectrum without judgment
- **Economic Contribution Diversity**: Purpose Score recognizing diverse forms of economic participation

- **Resource Access Differences**: Assessment recognizing different access to resources and opportunities

Rural and Urban Context Adaptation:

- **Geographic Isolation**: Connection Index adapted for rural communities with geographic distance challenges
- **Transportation Limitations**: Assessment recognizing rural transportation challenges and solutions
- **Community Resource Differences**: Assessment adapted for different community resource availability
- **Cultural Context Differences**: Recognition of rural/urban cultural differences in aging and community values

Family Structure and Care Model Adaptation

Diverse Family Structures:

- **Chosen Family**: Assessment including chosen family relationships and community family structures
- **Multi-Generational Households**: Assessment recognizing benefits and challenges of extended family living
- **Single Elder Households**: Assessment strength-based for elders living independently
- **LGBTQ+ Elder Considerations**: Assessment inclusive of diverse gender identities and relationship structures

Care and Support Model Variations:

- **Family Care Expectations**: Assessment respecting diverse cultural expectations about family care and elder independence
- **Mutual Aid and Community Care**: Assessment recognizing diverse approaches to community support and mutual aid
- **Professional Care Integration**: Assessment including diverse preferences about professional care and family support
- **Care Reciprocity**: Assessment recognizing elders as care providers as well as care recipients

6.3 Accessibility and Inclusion Adaptations

Cognitive and Physical Accessibility

Cognitive Accessibility Options:

- **Simplified Assessment**: Reduced complexity version for elders with cognitive changes or preferences
- **Assisted Assessment**: Family member or peer assistance option while maintaining elder control
- **Alternative Format**: Picture-based or alternative communication assessment options
- **Flexible Timing**: Assessment completion over multiple sessions to accommodate attention and energy

Physical Accessibility Accommodations:

- **Large Print**: Assessment available in large print and high contrast formats
- **Audio Version**: Spoken assessment with audio recording options for responses
- **Braille and Tactile**: Assessment available in Braille and other tactile formats
- **Assistive Technology**: Assessment compatible with screen readers and other assistive devices

Mental Health and Emotional Support Integration

Mental Health Sensitivity:

- **Depression Accommodation**: Assessment recognizing that depression may affect responses without pathologizing lower scores
- **Anxiety Considerations**: Assessment format designed to minimize anxiety and stress
- **Grief and Loss Recognition**: Assessment accommodating elders experiencing recent losses or major life changes
- **Trauma-Informed Approach**: Assessment sensitive to elder trauma history and current trauma impacts

Emotional Support During Assessment:

- **Peer Support Options**: Trained elder peer support during assessment completion
- **Professional Support**: Mental health professional availability for elders needing support during or after assessment
- **Community Support**: Community response plan for elders identified as struggling or in crisis through assessment
- **Follow-up Support**: Community commitment to follow-up support and resource connection based on assessment results

Section 7: Community Implementation and Program Evaluation

7.1 Community Assessment Program Development

Community-Wide Assessment Implementation

Assessment Program Structure:

- **Voluntary Participation**: Elder choice about assessment participation with no penalties for non-participation
- **Community Education**: Public education about assessment purpose and community benefit
- **Peer Assessment Training**: Training elder community members to assist with assessment completion and support
- **Resource Connection**: Systems connecting assessment results to available community resources and support

Community Assessment Schedule:

- **Annual Community Assessment**: Yearly community-wide assessment for program planning and resource allocation
- **New Resident Assessment**: Assessment for elders new to community for resource connection and community integration
- **Post-Program Assessment**: Assessment following participation in community programs to evaluate effectiveness
- **Crisis Assessment**: Emergency assessment for elders experiencing crisis or significant life changes

Data Collection and Privacy:

- **Community Data Ownership**: Elder community ownership and control of aggregate assessment data
- **Individual Privacy**: Individual assessment results remain private unless elder chooses to share
- **Anonymous Aggregate Reporting**: Community reporting using anonymous aggregate data to protect individual privacy

- **Consent and Control**: Clear consent processes with elder authority to modify or withdraw data sharing

Program Evaluation and Community Planning

Community Program Assessment:

- **AUBI Program Evaluation**: Assessment of Elder Wellbeing Index changes following AUBI implementation
- **Innovation Hub Impact**: Evaluation of innovation hub participation effects on Purpose and Wisdom Utilization scores
- **Community Program Effectiveness**: Assessment of community programs and services based on wellbeing outcomes
- **Resource Allocation Planning**: Community resource allocation based on assessment results and elder priorities

Community Wellbeing Improvement Planning:

- **Community Strengths Building**: Programs building on community wellbeing strengths and high-performing areas
- **Challenge Area Targeting**: Focused programs addressing community areas with lower wellbeing scores
- **Resource Development**: Community development of resources and programs based on assessment-identified needs
- **Peer Support Programming**: Development of peer support programs connecting elders with different wellbeing levels

7.2 Research and Evidence Development

Assessment Validation and Research

Community-Controlled Research:

- **Elder Community Research Leadership**: Elder community control over research design, implementation, and data interpretation
- **Cultural Validation**: Research validating assessment across diverse cultural elder communities
- **Intervention Effectiveness**: Research on community interventions and their impact on Elder Wellbeing Index scores
- **Longitudinal Studies**: Long-term research tracking elder wellbeing changes over time and across different life circumstances

Academic Partnership Research:

- **University Collaboration**: Partnership with academic institutions for research while maintaining community control
- **Publication and Dissemination**: Community-controlled publication of research results with elder community benefit priority
- **Policy Research**: Research supporting policy development and advocacy for aging support systems
- **International Research**: Cross-cultural research comparing Elder Wellbeing Index across different countries and cultural contexts

Best Practice Documentation and Sharing

Successful Implementation Documentation:

- **Community Success Stories**: Documentation of communities successfully improving elder wellbeing through assessment and programming

- **Program Innovation**: Recording of innovative programs and approaches developed based on assessment results
- **Cultural Adaptation Examples**: Documentation of successful assessment adaptation across diverse elder communities
- **Challenge and Solution Sharing**: Documentation of implementation challenges and effective solutions for other communities

Knowledge Sharing Networks:

- **Inter-Community Learning**: Networks enabling elder communities to share assessment experience and wellbeing improvement strategies
- **Professional Education**: Training for professionals working with elder communities on Elder Wellbeing Index implementation
- **Policy Maker Education**: Education for government officials and policy makers about Elder Wellbeing Index and its implications for policy
- **International Networks**: Global networks sharing Elder Wellbeing Index implementation and elder wellbeing improvement approaches

7.3 Quality Assurance and Continuous Improvement

Assessment Quality and Reliability

Assessment Quality Monitoring:

- **Inter-Rater Reliability**: Training and monitoring for consistent assessment completion when assisted assessment is used
- **Test-Retest Reliability**: Testing assessment consistency over time for individual elders
- **Cultural Validity**: Ongoing validation of assessment relevance and accuracy across diverse elder communities
- **Community Feedback Integration**: Regular community feedback about assessment relevance and effectiveness

Continuous Improvement Process:

- **Annual Assessment Review**: Yearly community review of assessment effectiveness and needed modifications
- **Cultural Community Input**: Regular input from diverse cultural communities about assessment cultural appropriateness
- **Professional Consultation**: Optional consultation with geriatric specialists and community development professionals
- **Research Integration**: Integration of research findings into assessment improvement and community program development

Community Capacity Building and Sustainability

Community Assessment Capacity:

- **Elder Assessor Training**: Training community elders to conduct peer assessments and provide assessment support
- **Community Leadership Development**: Development of elder leadership for assessment program management and community improvement planning
- **Resource Development**: Community capacity for developing resources and programs based on assessment results
- **Advocacy Skills**: Training for elder community advocacy based on assessment results and identified needs

Program Sustainability:

- **Community Ownership**: Elder community ownership and control of assessment program ensuring long-term sustainability
- **Resource Integration**: Integration of assessment with existing community resources and programs
- **Policy Integration**: Integration of Elder Wellbeing Index with government policy and resource allocation
- **Movement Building**: Connection with broader movements supporting elder rights and community wellbeing

Conclusion: Elder Wellbeing Through Community Assessment and Action

The Power of Elder-Defined Wellbeing Measurement

The Elder Wellbeing Index represents a fundamental shift from professional and institutional definitions of successful aging to elder community-controlled assessment of thriving and contribution. By measuring Purpose, Connection, Agency, and Wisdom Utilization, this assessment recognizes elders as whole human beings whose wellbeing encompasses meaningful activity, social relationships, self-determination, and community contribution.

This calculator enables elder communities to document their wellbeing, identify areas for improvement, track progress over time, and advocate for resources and programs that support elder thriving rather than simply managing decline.

Framework Integration and Community Empowerment

The Elder Wellbeing Index integrates with all components of the Aging Population Support Framework:

AUBI Economic Security: Assessment of how economic security through AUBI affects all dimensions of elder wellbeing **Meaningful Occupation**: Measurement of Purpose Score and Wisdom Utilization as outcomes of elder innovation hubs and employment inclusion **Healthcare Integration**: Assessment of how healthcare systems affect elder Agency and overall wellbeing **Social Inclusion**: Measurement of Connection Index as outcome of intergenerational programming and community integration **Governance Systems**: Use of wellbeing assessment for democratic community planning and resource allocation

Community Action and Advocacy

Elder Wellbeing Index results provide evidence for community action and advocacy:

Community Resource Allocation: Democratic community decisions about priorities based on assessment results and elder-identified needs **Policy Advocacy**: Evidence for aging policy advocacy demonstrating community needs and program effectiveness **Program Development**: Community development of programs and services addressing assessment-identified wellbeing challenges **Elder Leadership**: Elder community leadership in wellbeing improvement and community development

Call to Assessment Action

Every elder community possesses the capacity to assess and improve elder wellbeing through democratic community action. This calculator provides the tool for measurement and community planning.

Begin assessment today:

- Complete individual Elder Wellbeing Index assessment to understand personal wellbeing and set improvement goals
- Organize community assessment to understand collective elder wellbeing and needs
- Connect assessment results to community action planning and resource development
- Use assessment results for advocacy and policy development supporting elder thriving

Elder wellbeing is community-controlled and community-improved. This assessment tool provides the measurement framework. Elder communities provide the democratic authority. Community action creates the wellbeing improvements.

The future of elder wellbeing is community-assessed and community-led, and it begins with measurement and action today.

Assessment Support and Resources:

Training and Consultation: Contact agingframework.org/wellbeing for assessment training, community implementation support, and wellbeing improvement consultation.

Community Network: Join the Elder Wellbeing Assessment Network at agingframework.org/assessment to connect with other communities using the Elder Wellbeing Index.

Research Participation: Participate in research on Elder Wellbeing Index effectiveness and community wellbeing improvement through the framework research network.

Resource Access: Download assessment materials, training guides, and community planning templates at agingframework.org/tools/wellbeing.

The transformation to elder-controlled wellbeing assessment and improvement begins now, with communities measuring and acting on elder-defined thriving and contribution.