PROJECT LENS

WORKSHOP KIT 04 OF 05 · FACILITATOR GUIDE

AI for Families and Caregivers Facilitator Guide

See AI clearly.

Think clearly in an AI-powered world.

L	Learn	Understand AI.
E	Evaluate	Question and verify.
N	Navigate	Know when and how to use it.
S	Secure	Protect yourself and others.

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projectlensai.org

01

About this workshop

This 45-minute session is for the people who help older adults: adult children, grandchildren, neighbors, and caregivers. Older adults are welcome too, and the session works best when families come together. Attendees practice how to talk about AI and scams without lecturing, make a family safe word plan, and walk through a short safety setup they can do side by side at home. The message is **be a partner, not a supervisor.**

Detail	
Length	45 minutes (a 30-minute version is in the run of show)
Best for	Family nights, caregiver support groups, libraries, faith communities, workplaces, school parent groups
Group size	8 to 40 people. Plan one helper for every 10 during the activities.
Facilitators	One lead plus one helper. Student facilitators bring a useful perspective here: many are already a family's go-to tech helper.
Devices	Not required. Attendees only need a pencil.

By the end, attendees will be able to:

1. Start a respectful conversation with a loved one about AI and scams.
2. Make a family safe word plan, without writing the word down.
3. Walk through a short safety setup checklist together, with the older adult keeping control of their own accounts.
4. Recognize signs that a loved one may be caught in a scam, or leaning on AI in place of people.
5. Respond to a scam with care instead of blame, and know who to call in Oregon.

The tone to aim for: warm and practical. Older adults have decades of good judgment. Families are there to back them up, not take over.

02

What's in the kit

Item	Who it's for	How many to print
This facilitator guide	Lead and helper	1 per facilitator
Slide deck with speaker notes	Lead (projected)	Print slides 6 per page as a backup
Participant pack: conversation practice cards	Pairs	1 set per pair
Participant pack: family safety plan worksheet	Each household	1 per household
Participant pack: family plan card	Each attendee	2 per household, on cardstock if possible
Participant pack: quiz, feedback form, sign-in sheet, flyer	Attendees and host	1 quiz and 1 feedback form per person; 1 sign-in sheet per 20
AI for Families (Guide 5) and Scam Prevention Guide (Guide 3)	Take-home	1 each per household, or a QR code to projectlensai.org

03

Before the session

Two weeks before

- [ ] Confirm the date, room, group size, and accessibility needs (microphone, large print, wheelchair access, interpreters) with the host.
- [ ] Send the host the flyer from the participant pack. It invites families to come together.

- [ ] Ask the host whether attendees are mostly caregivers, mostly older adults, or a mix. Adjust your examples.

The day before

- [ ] Print handouts (see the table above).
- [ ] Rehearse out loud with your co-facilitator and time it.
- [ ] Check the phone numbers on slides 13 and 15 against the Scam Prevention Guide's "Who to call" page if it's been more than six months.

At the room (30 minutes early)

- [ ] Test the projector, laptop, and microphone. Save the deck offline.
- [ ] Seat people in pairs or small tables. Families can sit together.
- [ ] Put pencils, quizzes, and practice cards on each table.

04

Ground rules for facilitators

Read these before every session. They are the same in every Project LENS kit.

1. **Protect privacy.** Never ask attendees for personal details or account information. If someone volunteers a personal story, keep it general and don't write down names.
2. **No photos without permission.** Ask the host and the group before taking any photo. Never photograph someone who says no. Don't post photos online without written permission.
3. **Educate, don't advise.** You are teaching habits, not giving legal, financial, or medical advice. When someone asks about their own situation, point them to the right professional or helpline.
4. **Respect experience.** Your audience has decades of judgment. Never talk down, and don't let the room talk down about older relatives either.
5. **Stay neutral about AI.** AI is a tool, not good or evil. Don't push people toward it or scare them away from it.
6. **Use real, safe examples only.** Don't show actual scam links, phone numbers, or real people's private information on screen. Use the made-up examples in this kit.
7. **Don't promise outcomes.** Never say "you'll get the money back" or "this will stop every scam."
8. **Never collect money or sell anything.** Project LENS workshops are free and educational.
9. **Hands off other people's devices.** If someone wants help on their phone or tablet, they hold it and they type. Don't log into their accounts, don't create accounts for them, and don't type on their device. Show the steps on your own device or on the slide instead.

One more for this workshop: this session touches family relationships. If someone shares a hard story about a relative, thank them, keep it general, and offer to talk privately after, with the host present.

05

Run of show (45 minutes)

Time	Segment	Slides	What happens
0:00 to 0:04	Welcome and before-quiz	1 to 3	Introductions, agenda, 5-question quiz
0:04 to 0:09	Why this matters	4 to 5	The 2025 numbers; what AI can fake
0:09 to 0:15	Starting the conversation	6 to 7	Partner, not supervisor; "instead of, try"
0:15 to 0:25	**Activity 1: Conversation practice**	8 to 9	Pairs practice with role cards, then share
0:25 to 0:31	**Activity 2: Family safe word plan**	10 to 11	How to choose one; the four-step plan
0:31 to 0:37	Set up safety together	12 to 13	The side-by-side checklist
0:37 to 0:40	Warning signs, and if it happens	14 to 15	Signs to notice; words first, then steps
0:40 to 0:43	Wrap-up	16 to 17	Three things to remember, after-quiz
0:43 to 0:45	Feedback and questions	18	Feedback form, quick questions

30-minute version

Every segment gets shorter, so the timings add up to 30 minutes. Keep Activity 1 and the safe word plan; they matter most.

Time	Segment	Slides	What changes
0:00 to 0:02	Welcome	1 to 2	Skip the before-quiz and the after-quiz
0:02 to 0:05	Why this matters	4 to 5	Numbers and one example only
0:05 to 0:09	Starting the conversation	6 to 7	Read three "instead of, try" pairs, not all five
0:09 to 0:17	**Activity 1: Conversation practice**	8 to 9	One role card per pair; one pair shares
0:17 to 0:22	**Activity 2: Family safe word plan**	10 to 11	Full segment, shorter discussion
0:22 to 0:25	Set up safety together	12 to 13	Point to the worksheet; take it home
0:25 to 0:28	If it happens	15	Skip slide 14; point to the warning signs in Guide 5
0:28 to 0:30	Wrap-up and feedback	16, 18	Three things to remember; feedback form

06

Talking points

The full script is in each slide's speaker notes. These are the points that matter most.

Why this matters (slides 4 to 5)

- In 2025, Americans 60 and older reported losing $7.7 billion to online fraud. Oregonians 60 and older reported more than $77 million (FBI IC3). Most scams are never reported.
- AI makes old scams more convincing: a cloned voice of a grandchild, a fake video of a celebrity, a perfectly written message.
- Key line: *"Scammers want people alone and in a hurry. A family that talks regularly takes both of those away."*

Starting the conversation (slides 6 to 7)

- Lead with curiosity, not warnings. People open up when they feel respected, and shut down when they feel tested.
- Good moments: after a news story, after someone gets a strange call, at a family gathering as a group activity so no one is singled out.

Instead of...	Try...
"You need to be careful, you could get scammed."	"I read that scammers can copy voices with AI now. Have you heard about that?"
"Let me just do it for you."	"Want to try it together? You drive, I'll sit next to you."
"AI is dangerous, stay away from it."	"Some of this is really useful. Want to see what it can do?"
"How could you not know that?"	"This stuff changes so fast. I'm still learning it too."
"Give me your passwords so I can check."	"Let's set up a few safety settings together. You keep your passwords."

Set up safety together (slides 12 to 13)

The older adult stays in control of their own accounts and passwords. Families sit beside them.

- **Trusted contact.** Ask the bank or brokerage about adding a trusted contact. According to FINRA, a trusted contact can be reached if the firm suspects fraud, but cannot see balances or make transactions (FINRA).
- **Alerts.** Turn on text or email alerts for large withdrawals or purchases.
- **Credit freeze.** Free, and it stops new accounts being opened in their name: Equifax 1-888-298-0045, Experian 1-888-397-3742, TransUnion 1-800-916-8800.
- **Phone.** Turn on "Silence Unknown Callers" (iPhone) or call screening (Android); let unknown calls go to voicemail.
- **Chatbot privacy.** If they use a chatbot, find the privacy setting together: Settings, then Privacy or Data controls.

- **Save key numbers** in their phone: you, their bank's fraud line from the back of the card, and Oregon DOJ Consumer Protection (1-877-877-9392).

Warning signs (slide 14)

- New secrecy about money, calls, or an online friend.
- Unusual withdrawals, wire transfers, gift card purchases, or visits to Bitcoin ATMs.
- Anxiety around the phone, or a sudden urgent need for cash.
- Remote-access software on a computer they don't remember installing.
- **AI as company.** Chatting with AI can be fine. Check in if someone spends hours a day talking with a chatbot instead of people, trusts its advice over their doctor or family, or says it "understands them" better than anyone. The answer is more human connection, not taking the device away.

If it happens (slide 15)

- Words first: *"Thank you for telling me. This happens to smart, careful people every day. Let's fix this together."*
- Then the steps, together: stop contact; call the bank using the number on the card; change passwords, starting with email; freeze credit if a Social Security number was shared; write down what happened; report it to the FBI at ic3.gov and to Oregon DOJ at 1-877-877-9392. The National Elder Fraud Hotline (1-833-372-8311) can help file.
- If someone is taking advantage of an older adult, including a caregiver or relative, call Oregon's abuse reporting line: 1-855-503-7233.
- Watch for "recovery" scams: anyone offering to get the money back for a fee is another scammer.

07

Activity 1: Conversation practice (10 minutes, slides 8 to 9)

Goal: everyone practices opening a conversation about AI or scams in a way that feels respectful, and hears how it lands.

How to run it

1. Pair people up. Give each pair a set of the three role cards from the participant pack. (1 minute)
2. One person plays **the helper**, the other plays **the loved one**. The helper uses the opening line on the card; the loved one responds in character. (3 minutes)
3. Swap roles and use a second card. (3 minutes)
4. Ask two pairs: "What made it feel respectful? What would you say differently next time?" (3 minutes)

The three role cards

Card	The situation	Opening line to practice
A. The news story	You just saw a story about AI voice-clone scams.	"I read that scammers can copy voices with AI now. Have you heard about that?"
B. The strange call	Your mom mentions a weird call from "the bank" yesterday.	"That sounds stressful. Want to call the bank together, using the number on your card?"
C. The new app	Your granddad asks what ChatGPT is.	"Want to try it together? You drive, I'll sit next to you."

What to listen for

- Did the helper ask a question, or give a lecture?
- Did the loved one keep control, of the phone, the decision, the account?
- Did anyone slip into blame? Gently name it, and try the line again.

If families came together: let them practice with each other, using the cards as starters. Some families will start their real safe word conversation here. Remind them not to say the word out loud in the room.

08

Activity 2: Family safe word plan (6 minutes, slides 10 to 11)

Goal: every household leaves with a plan to choose a safe word together, which the FBI recommends against voice-cloning scams.

How to run it

1. Explain (slide 10): if someone calls claiming to be family in trouble, ask for the safe word. A voice clone won't know it.
2. Choosing a good one: easy to remember, impossible to guess. Not a pet's name, street, or birthday that's online. A silly phrase works well: "purple pancakes."
3. Walk through the four-step plan (slide 11), which is also on the family plan card:
    1. If anyone calls claiming to be family in trouble, ask for the safe word.
    2. No safe word? Hang up and call that person directly on the number you already have.
    3. Can't reach them? Call another family member before doing anything else.
    4. No family member will ever ask for gift cards, wire transfers, crypto, or cash by courier.

Ask each household to agree on **when** they'll choose their word: at the next family dinner, on the next phone call. They tick "We have agreed on a family safe word" on the card only once it's done.

Facilitator notes: never ask anyone to share their safe word, even as an example. Nobody writes the word on the worksheet or the card. Share it in person or by phone; never post, text, or email it. A card by the phone is visible to visitors and in-home helpers.

09

Hard questions and simple answers

They ask...	You can say...
"My dad won't listen to me about this."	"Try a question instead of a warning, or let him hear it from someone else, like this workshop or his bank. Respect goes further than rules."
"Should I just take over her passwords and accounts?"	"Not unless she asks. A trusted contact, account alerts, and a credit freeze protect her while she stays in charge. For legal arrangements like power of attorney, talk to an elder law attorney or the ADRC of Oregon at 1-855-673-2372."
"Can I monitor my mom's phone?"	"Only with her knowledge and agreement. Secret monitoring damages trust, and trust is what makes her call you first."
"Grandpa talks to a chatbot all day. Is that bad?"	"It can be fine. Check in if it's replacing people, or if he trusts it over his doctor. The answer is more connection: calls, visits, invitations."
"Mom already sent money to a scammer."	"Call her bank first, using the number on her card. Then report it at ic3.gov and to Oregon DOJ at 1-877-877-9392. The National Elder Fraud Hotline (1-833-372-8311) can help. And tell her it's not her fault."
"What if the person taking advantage is a relative or caregiver?"	"Call Oregon's abuse reporting line at 1-855-503-7233. You don't need proof to make a report."
A question you can't answer	"I don't want to guess. A librarian at answerland.org can help, free, any time."

10

After the session

Quiz answer key (same 5 questions before and after)

#	Correct answer
1	C: "Want to try it together? You drive, I'll sit next to you."
2	False: say it in person or by phone; never write, post, or text it
3	B: Hang up and call them back on a number you already have
4	False: a trusted contact can be reached about suspected fraud but can't see balances or make transactions
5	D: All of the above

Scoring: count correct answers for the whole group before and after, not by person.

Within one week

- [ ] Add a row to the session log.
- [ ] Read the feedback forms and note one thing to improve.
- [ ] Only share comments where the person ticked "OK to share," and never with names.
- [ ] Within one week, copy any emails from the sign-in sheet into the Project LENS mailing list, then shred the sheet. The host doesn't keep a copy.
- [ ] Thank the host, and offer Kit 2 (AI Scams and Deepfakes) or Kit 3 (Hands-on Prompting Lab) as a follow-up.

Session log

Date	Host and location	Facilitators	Attendees	Avg before	Avg after	One thing to improve

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This workshop is for education only. It is not legal, financial, or medical advice.

AI changes quickly. We review this workshop every six months. For the newest version, visit projectlensai.org.

Sources: FBI IC3 2025 Annual Report · FBI IC3 PSA I-120324-PSA (Dec 2024) · FINRA: Trusted contact · TransUnion credit freeze

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