

An aerial photograph of Portland, Oregon, showing a dense urban landscape with numerous skyscrapers and residential areas. In the background, the snow-capped peak of Mount Hood rises above a range of blue mountains under a clear sky. The foreground is partially obscured by green trees.

# Towards an Age-Friendly Portland

WORKPLAN AND MEMORANDUM OF UNDERSTANDING

Portland Bureau of Planning and Sustainability + Orca Planning



# CONTENTS

<b>INTRODUCTION</b> .....	<b>4</b>
Project Background.....	4
Problem Statement .....	5
Project Scope.....	5
<b>PHASE ONE: CREATING A VISION FOR AN AGE-FRIENDLY PORTLAND</b> .....	<b>7</b>
Research .....	7
Public Involvement .....	8
Data Collection and Analysis .....	9
Interim Products of Phase One .....	10
<b>PHASE TWO: DEVELOPING POLICY RECOMMENDATIONS FOR AN AGE-FRIENDLY PORTLAND</b> .....	<b>11</b>
Research .....	11
Public Involvement .....	12
Data Collection and Analysis .....	12
Interim Products of Phase Two .....	12
<b>FINAL PRODUCT</b> .....	<b>13</b>
<b>ROLES AND RESPONSIBILITIES</b> .....	<b>13</b>
<b>PROJECT TIMELINE</b> .....	<b>14</b>
<b>MEMORANDUM OF UNDERSTANDING</b> .....	<b>15</b>



## ORCA PLANNING IS:

Dawn Hanson | Mark Person | Garrett Phillips  
Collin Rowan | Collin Roughton | Alison Wicks



# INTRODUCTION

## PROJECT BACKGROUND

For the next 18 years, between 7,000 and 10,000 members of the Baby Boom generation will turn 65 each day in the United States. The Ageing of the nation and of our region will have profound effects on our housing, transportation, economy, health care and society in general. While older adults are not a homogenous group and on balance the needs of older adults 65-84 are quite different than the needs of those 85 and over, ensuring that this population continues to have a high quality of life as they age is an unprecedented challenge. Portland is known for its livability, and retaining, attracting, and supporting an Ageing population across a wide spectrum of incomes, races, and ethnicities represents a key opportunity to bolster its reputation as a livable city.

Recognizing that the Ageing of our society will pose unique challenges and opportunities to the City of Portland, Mayor Sam Adams officially requested membership into the World Health Organization's (WHO) Global Network of age-friendly Cities in 2010. As a condition of membership, Portland must continually assess its age-friendliness. The WHO provides a general set of guidelines for what an age-friendly city should include. However, the global orientation of the WHO framework does not specify what qualities "an age-friendly Portland" would possess. What unique assets and opportunities does our city have to build upon? Are there specific obstacles that our city faces in order to become more age-friendly?

The Portland Bureau of Planning and Sustainability (BPS) recently released the draft Portland Plan, a 25-year vision to make the city prosperous, healthy and provide resources equitably; however, it did not investigate the unique needs and opportunities of older adults. Equity in planning needs to address the special needs of Ageing adults and under-resourced communities. Portland will soon begin work updating its comprehensive plan, and incorporating the needs of residents of all ages and abilities will be a critical plan component.



## PROBLEM STATEMENT

Portland City Council has committed to improving livability for the city's increasingly older population, yet planning efforts to date have not articulated a vision or policy directions for an age-friendly Portland. However, Portland's Bureau of Planning and Sustainability will begin work on a comprehensive plan update later this year. The update to Portland's Comprehensive Plan represents a unique opportunity for the City to coordinate age related livability improvements with city services and investments.

## PROJECT SCOPE

Orca Planning will articulate a vision for an age-friendly Portland and develop policy recommendations to achieve that vision. The vision and policy recommendations will be designed to inform the City of Portland's comprehensive plan update and other city policies and actions, focusing on the built environment. Orca Planning will create a final written document containing 1) a vision for an age-friendly Portland, 2) policy recommendations, 3) a summary of the processes used to create the vision and recommendations, and 4) a summary of relevant findings from the public participation processes, research, and analyses.

The final product will be written in a way that is understandable to the public and allows City of Portland staff and potential partners to act on it. The vision and policy recommendations will recognize the variation in opportunities and challenges within the Ageing population and within the built and natural environment of the city.

Major tasks for creating the vision and policy recommendations are summarized briefly below. Although the two phases overlap somewhat chronologically, the majority of Phase 1 tasks will take place before the the majority of Phase 2 tasks.

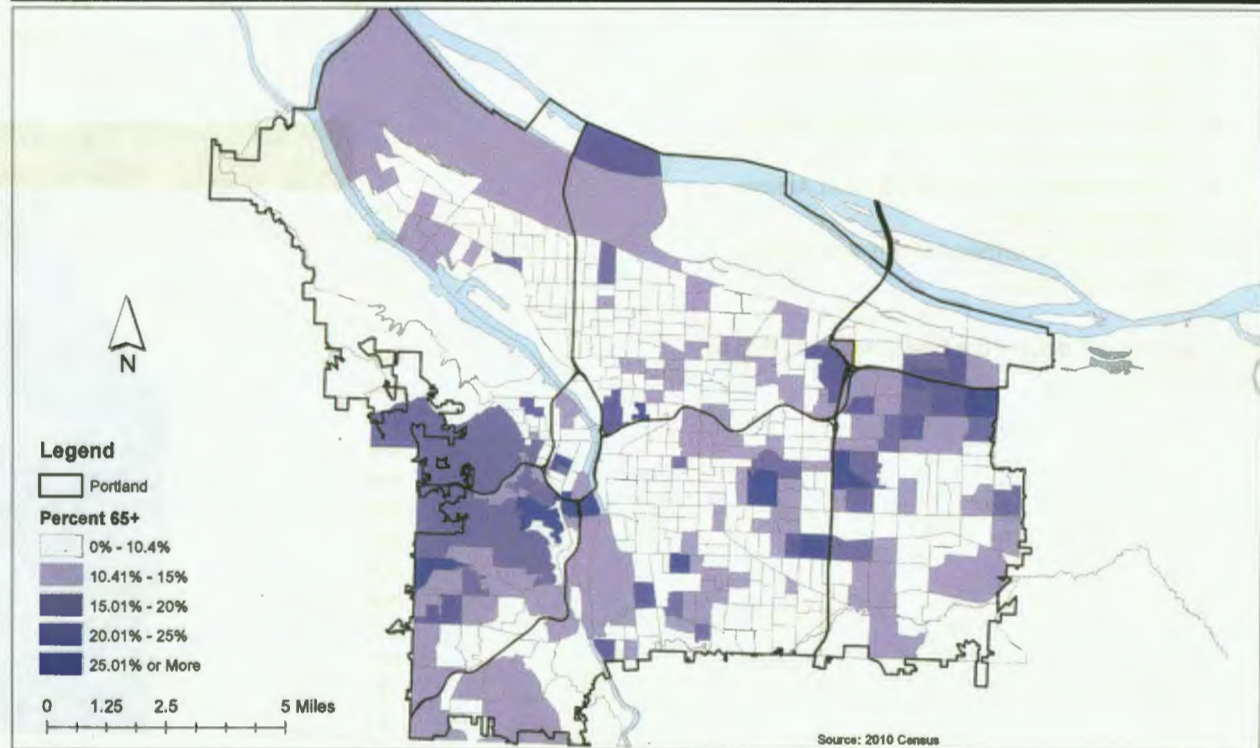
### PHASE ONE: CREATING A VISION FOR AN AGE-FRIENDLY PORTLAND

- Review literature related to age-friendly cities
- Review relevant local plans and policies
- Understand Ageing Portlanders' visions for an age-friendly Portland
- Synthesize the results of initial public discussions into a Draft Vision
- Incorporate feedback from Portland residents into the Draft Vision
- Incorporate feedback from BPS into the Draft Vision

### PHASE TWO: DEVELOPING POLICY RECOMMENDATIONS FOR AN AGE-FRIENDLY PORTLAND

- Research best practices
- Update and refine literature and plan/policy reviews
- Analyze existing conditions, including relevant barriers and assets
- Develop and prioritize Draft Recommended Policies
- Incorporate feedback from the public on Draft Recommended Policies
- Incorporate feedback from BPS on Draft Recommended Policies

Distribution of Older Adults by Block Group





Discussions with baby boomers, older Portlanders and service providers will inform the draft vision. Research and analysis will supplement our efforts. Orca Planning will then obtain feedback from BPS, stakeholders and the public on the draft vision, and use the feedback to create a final vision for an age-friendly Portland.

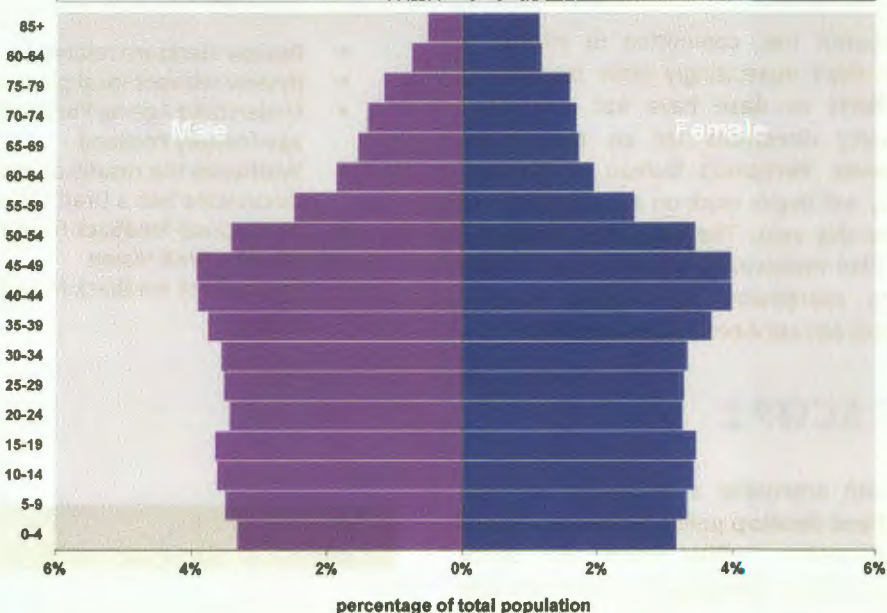
The vision will guide development of policy recommendations. As the vision is articulated, Orca Planning will research and analyze data on relevant existing conditions, barriers, assets, and best practices. Orca Planning will solicit feedback on the draft policy recommendations from stakeholders, the public, and BPS, and will use the feedback to create final policy recommendations.

Orca Planning will create a series of interim written products for BPS, and will request feedback from BPS on the products to inform subsequent steps. The interim products are:

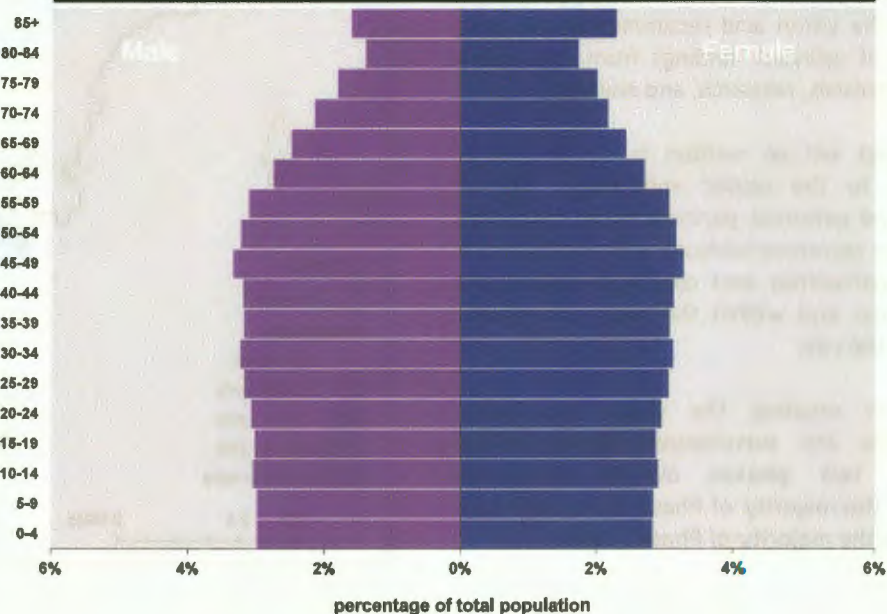
- Draft Vision for an Age-friendly Portland (March 19<sup>th</sup>, 2012)
- Final Vision for an Age-friendly Portland (April 9<sup>th</sup>, 2012)
- Draft Recommended Policies and Actions (April 23<sup>rd</sup>, 2012)
- Final Recommended Policies and Actions (May 14<sup>th</sup>, 2012)

Orca Planning will deliver the final product to BPS by June 11<sup>th</sup>, 2012.

Oregon Population Distribution by Age and Sex, 2000



Oregon Population Distribution by Age and Sex, 2040



## PHASE ONE:

# CREATING A VISION FOR AN AGE-FRIENDLY PORTLAND

## RESEARCH

Orca Planning will research existing demographic conditions, other visioning processes, and age-related plans and plan processes to inform an age-friendly vision and policy recommendations for Portland. Throughout the arc of the project research will be conducted in three interrelated steps: a review of relevant literature, a review of local plans and policies, and identification of best practices and lessons learned.

The research will provide an understanding of age-related issues, enabling Orca Planning to communicate effectively with potential stakeholders, planning partners, and the public during initial public participation processes. As Orca Planning develops a vision for an age-friendly Portland, the focus of research will shift to informing policy recommendations.

The research will be divided by the objectives of each phase. Phase One research will be the most comprehensive step. The primary objective of Phase One research will be to provide background and context for all subsequent steps of the project. A literature review, inventory of plans, and development of lessons learned will inform both phases of the project. Specific to the visioning process, Phase One research will catalog relevant tools and construct a policy framework to fit an age-friendly vision. Additionally, the initial research will enable Orca Planning to plan and execute later research more effectively. Phase Two research will build upon the Phase One research by focusing on policy research and implications of recommended policies.



### Review relevant literature

The first step in the research process is to collect and analyze the academic and institutional literature. The intentions of this step are to collect a wide range of perspectives on Ageing and how it relates to health, housing, transportation, and economics. Analysis of this information will direct the course of inquiry for our data collection, public outreach, and ultimately for a vision. The products of this step will be a comprehensive literature review in the form of an annotated bibliography and more detailed reviews of key literature.

**Goal:** Inform the creation of age-friendly strategies based on academic and institutional literature.

### Inventory Plans and Policies

An inventory of plans will analyze local, regional and state plans, highlighting coordinated policies, goals, and objectives. The intentions of this step are to locate age-friendly language and intention implicit in existing plans and to create a hierarchy of policies in order to best place the team's vision and recommendations. The product of this step will be a complete review of existing plans at multiple levels.

**Goal:** Create a clear understanding of plan hierarchies and linkages. Identify plans and policies with

inclusionary language and those that require age-friendly provisions.

### Best practices and lessons learned

This research will provide analysis of relevant domestic and international examples in order to provide context and direction to the Project Team's planning efforts. The intention of this step is to document strategies and policies that have been proven successful as well as those that have not been. Collection of these examples will provide Orca Planning general topical literacy and inspire innovative approaches.

**Goal:** Provide a collection and analysis of age-friendly practices from around the world.

## PUBLIC INVOLVEMENT

Orca Planning will use a cross-cutting suite of public involvement techniques to inform the creation and refinement of a vision and policy recommendations. Stakeholders and members of the public, including older community members, their families, and service providers, will be engaged. Orca Planning will gather community knowledge, include ideas and feedback of individuals and agency representatives, facilitate partnership building within Portland's age-friendly

network and work to raise awareness of the city's age-friendly aspirations.

During Phase One public involvement techniques will aim at gathering community knowledge to form the vision of an age-friendly Portland and to gather feedback on the draft vision. Phase One consists of a stakeholder inventory, meeting with an existing Stakeholder Advisory Group, small Talk-Shops, and two larger workshops.

### Stakeholder Inventory

The purpose of the stakeholder inventory is to gather information about Portland's growing age-friendly network and identify individuals and organizations interested in taking part in this project. Through one-on-one interviews with stakeholders Orca Planning will evaluate a stakeholders' level of interest in participating in the planning effort over the next three months, connect with groups of Portlanders appropriate for focus group discussions, and identify age-friendly advocates.

**Goal:** To take the pulse of the Portland's age-friendly community and who out there is willing to help.

## PHASE ONE: CREATING A VISION FOR AN AGE-FRIENDLY PORTLAND

### RESEARCH

- Review relevant literature
- Inventory local plans and policies
- Identify best practices

### PUBLIC INVOLVEMENT

- Inventory stakeholders
- Consult with Age-Friendly City Task Force
- Distribute questionnaire
- Organize and facilitate Talk-Shops
- Launch photo campaign
- Use social media to connect with stakeholders and promote events
- Host Workshops

### DATA COLLECTION + ANALYSIS

- Analyze demographics
- Analyze and synthesize data
- Identify and collect additional data for Phase Two



## Stakeholder Advisory Group

The Age-Friendly City (AFC) Taskforce is an existing group convened by the Portland State University Institute on Ageing (IOA). Throughout the timeline of the project the AFC Taskforce will serve in an advisory capacity. Orca Planning will communicate progress, report findings and ask for feedback from this group of local experts. The AFC Taskforce will contribute to the development of the "Vision for an Age-Friendly Portland", provide feedback on the draft vision, contribute to the development of "Policy Recommendations for an Age-Friendly Portland," and provide feedback on the draft policy recommendations. We will attend their quarterly meetings, meet with members individually and ask for their participation in Workshops.

**Goal:** To gather information and receive feedback from local age-friendly experts.

## Questionnaire

Orca Planning will design a questionnaire targeted towards baby boomers and Ageing adults. Orca Planning will pilot test the questionnaire with people in our target population prior to wider distribution. The questionnaire will be available in paper and web formats, and contain open-ended and closed-ended questions that will help guide the project team's visioning process and policy recommendations.

**Goal:** To reach a broader range of the population by gathering information from people who don't attend Talk-Shops or workshops.

## Talk-Shops

Through stakeholder and AFC Taskforce connections Orca Planning will set up six (6) group discussions with members of Portland's ageing population. Targeted questions and activities will be used to gather local knowledge, including assets of the age-friendly community and barriers that exist for Portland's ageing population. In the Talk-Shops, Orca Planning will strive to capture views across race and ethnicities, income levels and city geography. Ideas that emerge from these conversations will be incorporated into the "Vision for an Age-Friendly Portland."

**Goal:** Gather knowledge from at least 60 individuals in Portland's Ageing community and incorporate ideas into the "Vision for an Age-Friendly Portland"

## Workshops

Orca Planning will host two "Vision-shops" to gather feedback on the draft "Vision for an Age-Friendly Portland." Key to the Vision-shops' success will be re-engaging stakeholders, the AFC Taskforce, and past focus group participants. The "Vision-shops" will be also be open to the public, providing a forum through which anyone can contribute to the vision. Two "Vision-shops" will be held, one in central Portland and one in East Portland.

**Goal:** To re-engage previous participants and receive feedback on the draft vision.

## Community Outreach and Awareness

Throughout Phase One Orca Planning will implement public involvement techniques focused on community outreach and raising awareness of Portland's commitment to becoming an age-friendly city. The community outreach and awareness techniques include a mayoral forum co-hosted with local organizations, an interactive photo campaign, and social media outreach.

### IOA, AARP and Elders in Action, age-friendly Portland Mayoral Forum

Orca Planning will coordinate with AARP, Elders in Action, and the IOA to host a forum with the City of Portland mayoral candidates to discuss issues important to the ageing community. In the coming weeks Orca Planning will learn more details about the event and negotiate their responsibilities with AARP and Elders in Action.

**Goal:** Raise awareness of Portland's age-friendly aspirations

### "An age-friendly city \_\_\_\_\_" Photo Campaign

The purpose of the "An age-friendly city is \_\_\_\_\_" (fill-in-the-blank) Photo Campaign is to increase the

awareness of Portland's age-friendly aspirations. The photo campaign will easily involve people in the project, gather a basic level of information and will be used to create engaging promotional material. Stakeholders, AFC Taskforce members, focus group participants and "Vision-shop" attendees will be asked to participate. In addition a photo booth will be set up at the April 7th mayoral forum and individuals will be able to upload their own photo to our Facebook page

**Goal:** Raise awareness of Portland's age-friendly aspirations

## Social Media Channels

Orca Planning will use social media channels, including Twitter and Facebook to communicate Age-Friendly Portland news and to promote events.

**Goal:** Raise awareness of Portland's age-friendly aspirations

# DATA COLLECTION AND ANALYSIS

Data collection and analysis will inform both the vision and the policy recommendations of the Age-Friendly Portland Plan. Phase One consists of demographic analysis to inform the age-friendly vision, and the collection of data for analysis in Phase Two.

## Demographic Analysis

Orca Planning will analyze national, state and local demographic trends. Paying particular attention to ageing, the team will collect population projection data from BPS in an effort to better understand the dynamics of population growth over the coming decades. Orca Planning will collect data on income, race/ethnicity, and unemployment from the US Census and American Community Questionnaire, Simply Explorer, and project partners. Orca Planning will conduct the analysis using ArcGIS and Microsoft Excel.



**Goal:** Understand the Ageing population demographics and to highlight trends.

### Analysis and Synthesis of Data from Public Involvement Activities

The team will gather qualitative and quantitative information during Talk-Shops and workshops in Phase One to help inform the age-friendly vision for Portland. The team will enter the information collected into tables and Microsoft Excel and analyze it to inform the final vision and to assist in prioritizing policy recommendations.

**Goal:** Construe the feelings, attitudes, and experiences of the ageing population.

### Data collection for Phase Two

As Orca Planning develops “The Vision for an Age-Friendly Portland,” the project team will identify and collect additional data needed to the draft the policy recommendations.

**Goal:** Inform draft policy recommendations.

## INTERIM PRODUCTS OF PHASE ONE

Research, public involvement, and data analysis activities conducted during Phase One will allow for the production of two interim products. **Orca Planning will submit a Draft Vision for an Age-Friendly Portland to BPS on March 5th, 2012. After a series of updates and revisions, Orca Planning will produce the Final Vision for an Age-Friendly Portland by April 2, 2012.**



## PHASE TWO:

# DEVELOPING POLICY RECOMMENDATIONS FOR AN AGE-FRIENDLY PORTLAND

## RESEARCH

An abbreviated research process will remain integrated throughout the project. The literature review and annotated bibliography will continue to be updated. Best practices and lessons learned will be documented for ongoing reflection and inspiration. Based on recommendations from stakeholders and the community additional avenues of research may be taken. A shift of focus will move the research toward the creation of policy recommendations rooted in the literature as well as public input.

The intention of this phase of research is to ensure the continuous assembly of information and a thorough detailed Questionnaire of available literature. The product of this phase will be updates to all previous research steps. The literature review, inventory of plans, best practices, and lessons learned documents will be revisited in order to better develop our universe of knowledge.

**Goal:** Continue research process in order to provide feedback and greater understanding to vision and policy recommendations.

## PUBLIC INVOLVEMENT

The focus of public involvement during Phase Two will be to integrate stakeholder input into policy recommendations and receiving feedback on draft policy recommendations. Key stakeholders will be engaged through the Stakeholder Advisory Group.

### Stakeholder Advisory Group

During Phase Two members of the AFC Taskforce will continue to contribute by informing the development of "Policy Recommendations for an Age-Friendly Portland," and providing feedback on the draft policy recommendations.

**Goal:** To gather information and receive feedback from local age-friendly experts.

### Questionnaire

Orca planning will analyze responses to the questionnaire. The findings will help the project team identify Portland's "Ageing readiness" and to help determine what the City's role should be in providing age-friendly policies. The questionnaire will also help refine the draft vision.

**Goal:** to help guide and inform Orca Planning's policy recommendation efforts.

### Community Outreach and Awareness

Public involvement techniques used in Phase One, including the "To me an age-friendly city is \_\_\_\_\_" photo campaign and social media channels, will continue to be utilized to further community outreach and raise awareness of Portland's commitment to becoming an age-friendly city.

**Goal:** Raise awareness of Portland's age-friendly aspirations

## DATA COLLECTION AND ANALYSIS

Phase Two will further analyze existing conditions data collected during Phase One to inform and to help prioritize policy recommendations.

### Analysis of existing conditions

Orca Planning will analyze Phase One data collected from public engagement activities, project partners, the US Census and American Community Questionnaire, and local government agencies. Orca Planning will analyze the data using ArcGIS and Microsoft Excel. Orca Planning's analysis will move toward policy recommendations for improving transportation, housing, employment, services and public spaces for older adults.

**Goal:** Understand the range of variation within Ageing populations, to highlight the challenges of the Ageing population, and to inform and prioritize policy recommendations.

## INTERIM PRODUCTS OF PHASE TWO

Based on the results of previous research, public involvement, and analysis, Orca Planning will develop a set of potential policy recommendations by April 23, 2012. Orca Planning will evaluate and select alternatives in partnership with key stakeholders, the Bureau of Planning and Sustainability, and the Age-Friendly Cities Taskforce, and submit final recommendations to the Bureau of Planning and Sustainability on May 14, 2012.

## PHASE TWO: DEVELOPING POLICY RECOMMENDATIONS FOR AN AGE-FRIENDLY PORTLAND

### RESEARCH

- Update and refine:
  - Literature review
  - Local plans and policies
  - Best practices

### PUBLIC INVOLVEMENT

- Engage mayoral forum participants
- Continue consultation with Age-Friendly City Task Force
- Continue outreach activities
- Complete photo campaign

### DATA COLLECTION + ANALYSIS

- Analyze existing conditions
- Evaluate and prioritize policy recommendations
- Analyze results of questionnaire



# FINAL PRODUCT

Orca Planning will deliver the final product or our efforts to the Bureau of Planning and Sustainability on June 11, 2012. This report will contain 1) The Vision for an Age-Friendly Portland, 2) policy recommendations for an age-friendly Portland, 3) a summary of the processes used to create the vision and policy recommendations, and 4) a summary of relevant findings from the public participation processes, research, and analyses.

## ROLES AND RESPONSIBILITIES

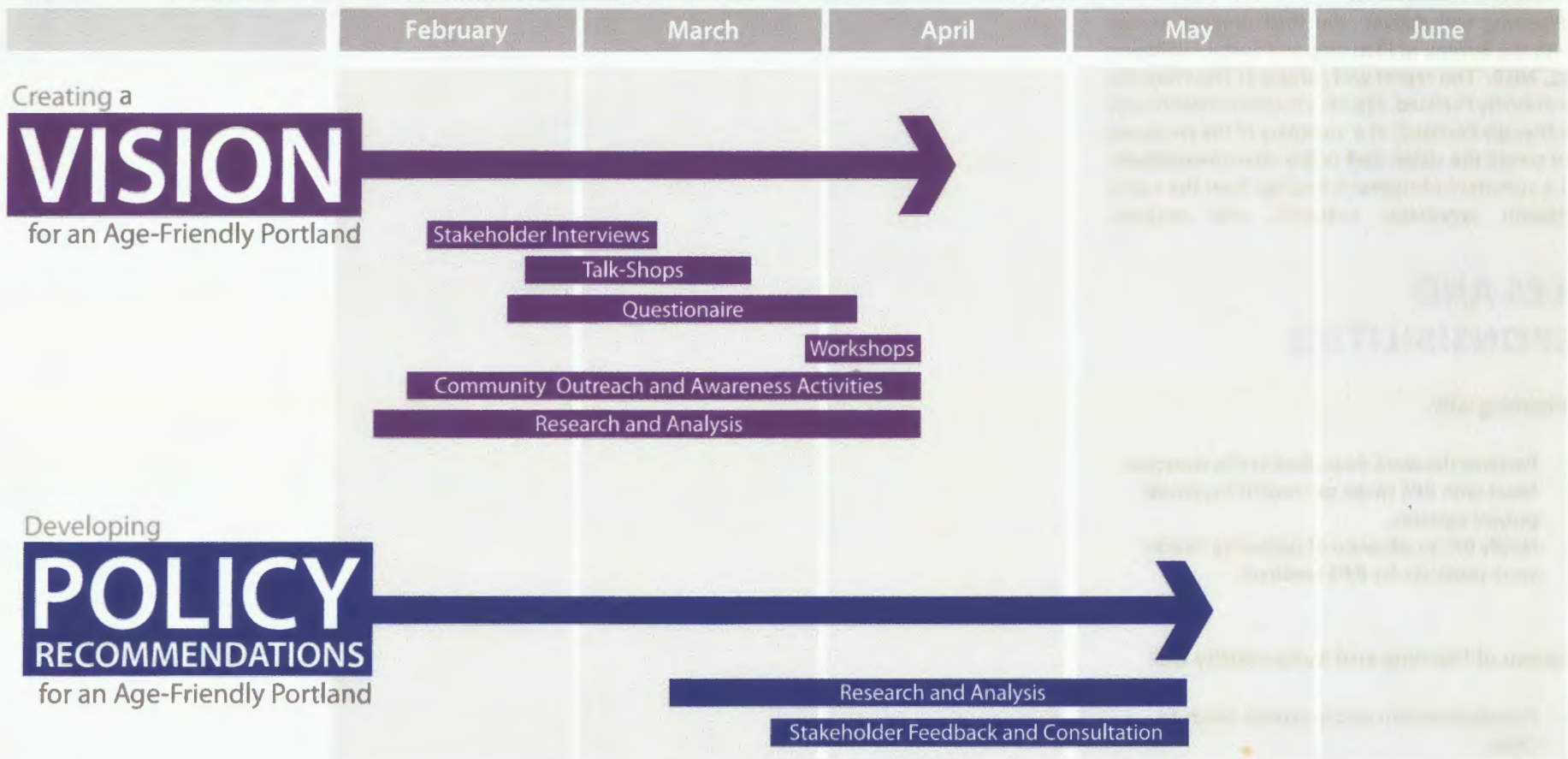
Orca Planning will:

- Perform the work described in this workplan.
- Meet with BPS twice per month to provide project updates.
- Notify BPS in advance of delivering interim work products for BPS feedback.

The Bureau of Planning and Sustainability will:

- Provide direction and articulate needs to Orca.
- Meet every other week with Orca to discuss project progress and needs.
- Respond to consultant requests in a timely manner.
- Contribute relevant information and data when possible as described in the Work Plan.
- Attend Work Plan and MOU presentation at Portland State University on February 13.
- Contribute up to \$750.00 for printing, translation, and refreshments for public outreach effort (see detailed budget), and
- Review major deliverable draft products and provide feedback within a week.

# PROJECT TIMELINE



## Interim and final PRODUCTS



**March 19**  
Draft  
Vision



**April 9**  
Final  
Vision



**April 23**  
Draft  
Policies



**May 14**  
Final  
Policies



**June 11**  
Final  
Product





# MEMORANDUM OF UNDERSTANDING

This Memorandum of Understanding (MOU) is hereby made and entered into by Orca Planning and the City of Portland's Bureau of Planning and Sustainability (BPS).

**City of Portland BPS**  
1900 SW 4th Avenue, Suite 7100  
Portland, Oregon 97201  
Bill Cunningham, City Planner

**Orca Planning**  
Portland State University  
Toulon School of Urban Studies and Planning  
PO Box 751-USP  
Portland, Oregon 97201  
Mark Person, Client Liaison

We, BPS and ORCA, agree to collaborate and agree to the terms, articles, and clauses set forth in this Memorandum of Understanding.

## ARTICLE I) PURPOSE AND SCOPE

The purpose of this MOU is to establish a cooperative relationship between Orca Planning and BPS. This document describes the roles and responsibilities of each party as they relate to the development of an Age-Friendly Vision Plan and policy recommendations for Portland. This project is a student project in the Planning Workshop required for graduation from Portland State University's Master in Urban and Regional Planning program.

## ARTICLE II) STATEMENT OF MUTUAL BENEFIT AND INTERESTS

BPS has indicated that they are interested in making Portland more age-friendly and has recently joined the World Health Organization's Global Network of Age-Friendly Cities. Part of the membership in the network of age-friendly cities is a commitment to continually improve age-friendliness. BPS and Portland State's Institute on Aging have committed to creating an age-friendly action plan. Whereas ORCA seeks a learning experience in which students can apply their interests, skills and experience for the creation of age-friendly vision for Portland to inform the comprehensive plan and action plan that will mutually benefit all parties.

## ARTICLE III) ROLES AND RESPONSIBILITIES OF ORCA PLANNING:

- a. Complete the following eight project tasks:
  - i. Project Development;
  - ii. Research and Review Literature;
  - iii. Organize and Facilitate Public Involvement;
  - iv. Data Collection;
  - v. Data Analysis;
  - vi. Identify and Analyze Alternatives;
  - vii. Produce Final Age-Friendly Vision Plan; and,
  - vii. Present final recommendations focusing on the built environment and a professional-quality report to BPS, stakeholders and the public.

## ARTICLE IV) ROLES AND RESPONSIBILITIES OF BPS:

- a. Provide direction and articulate needs to Orca;
- b. Meet every other week with Orca to discuss project progress and needs;
  - i. March 2, March 16, March 30, April 13, April 27, May 11 and May 25
- c. Respond to consultant requests in a timely manner;
- d. Contribute relevant information and data (demographics, GIS files, etc.) when possible as described in the Work Plan;
- e. Attend Work Plan and MOU presentation at Portland State University on February 13;
- f. Contribute up to \$750.00 for printing (flyers, business cards), translation, and refreshments for public outreach effort;
- g. In-kind printing of up to three (3) poster size color documents related to the project and up to ten (10) 11x17 color copies ; and,
- h. Review major deliverable draft products and provide feedback within a week.

## ARTICLE V) ISSUES OF MUTUAL UNDERSTANDING:

- a. All parties agree to maintain frequent communication and contact to facilitate communication under this Memorandum of Understanding;
- b. All parties agree to inform the other of problems that may compromise the integrity of this Memorandum of Understanding; and,
- c. Orca Planning is not receiving compensation for the completion of this project.

## ARTICLE VI) PRINCIPAL CONTACTS

Bureau of Planning and Sustainability  
 Bill Cunningham  
[bill.cunningham@portlandoregon.gov](mailto:bill.cunningham@portlandoregon.gov)  
 (503) 823-4203

Orca Planning  
 Mark Person  
[mark.person@pdx.edu](mailto:mark.person@pdx.edu)  
 (503) 516-0453

## ARTICLE VII) TERM OF AGREEMENT AND AMENDMENT

- a. This Memorandum of Understanding is effective upon execution of signatures of all parties and expires June 15, 2012.
- b. Modification
  - i. Either party may modify the scope of work or Work Plan at any time by consent of both parties and by issuing written notice.
- c. Termination
  - i. Either party can terminate this agreement in whole, or in part, in writing at any time before the expiration of the agreement. Prior to such action, the terminating party is expected to make a good faith effort to reconcile any differences leading to termination and to provide written justification.



ARTICLE VII) AUTHORIZATION

The signing of this MOU is not a formal undertaking nor an agreement or contractual obligation. It implies that the signatories will strive to reach, to the best of their ability, the objectives stated in the MOU.

Signed by: 



2-22-12

Bill Cunningham

Date

City Planner

Bureau of Planning and Sustainability



2-22-12

Garrett Phillips

Date

Mark Person

Date

Orca Planning

Orca Planning



2-22-12

Alison Wicks

Date

Dawn Hanson

Date

Orca Planning

Orca Planning



2/22/12

Collin Roughton

Date

Colin Rowan

Date

Orca Planning

Orca Planning

ORCA Planning Workplan Garrett Phillips, Colin Rowan, Collin Roughton, Alison Wicks, Weekly Meetings Monday 2:30. Wednesday in Class until 7 if needed.					Feb					Mar					Apr					May					Jun				
Age Friendly Planning Project					Start	End	Lead	30	6	13	20	27	5	12	19	26	2	9	16	23	30	7	14	21	28	4	11		
Upcoming dates					Wed 2/22																								
					Wed 2/29/2012																								
					Wed 3/14/2012																								
					Class visitor/ Workplan Due																								
					Class Visitor																								
I. Project Planning																													
Problem Definition & Scoping																													
Draft Workplan/MOU																													
Final Workplan /Signed MOU																													
Draft Report Outline																													
Workplan Revision																													
II. Research: Existing Conditions and Best Practices																													
Portland Planning Context and Policies																													
Current Portland Age Friendly Practices																													
Age Planning Context—Other Cities																													
Best Practice Review																													
Literature Reviews																													
Complete Annotated Bibliography																													
III. Data Analysis																													
Demographic Data Collection																													
Demographic Data Preparation																													
Demographic Data Analysis																													
Report																													
Analysis to support Policy Recommendations																													
Create Maps																													
IV. Public Participation																													
Draft Public Participation Plan																													



ORCA Planning Workplan																															
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Age Friendly Planning Project				Start	End	Lead																									
Finalize Public Participation Plan																															
Revisit Public Participation Plan																															
Stakeholder Analysis/Engagement																															
Create Citizen Advisory Committee																															
Facilitate Citizen Advisory Committee Meetings																															
Asset Mapping																															
Create Outreach Materials: Posters, Flyers, Articles																															
General Community Outreach/Engagement																															
Social Media																															
Part I: Vision for an Age Friendly Portland																															
Scheduling/Organizing																															
Focus Groups																															
Stakeholder Interviews																															
Draft Vision																															
Part 2: Vision Feedback & Policy																															
Scheduling/Organizing																															
Focus Groups																															
Stakeholder and Client Review																															
Two Workshops																															
Final Vision																															
Part 3: Vision and Policy Feedback																															
Draft Policy Recommendations																															
Stakeholder & BPS feedback																															
Final Policy Recommendations																															
Mayoral Forum at PSU																															
V.	Draft Recommendations																														
	Draft Vision																														
	Final Vision																														
	Identify Alternatives																														
	Analyze Alternatives																														
	Draft Policy Recommendations																														
	Final Policy Recommendations																														



[illegible]



ORCA Planning Workplan				Feb							Mar				Apr				May				Jun			
Garrett Phillips, Colin Rowan, Collin Roughton, Alison Wicks, Weekly Meetings Monday 2:30. Wednesday in Class until 7 if needed.																										
Age Friendly Planning Project	Start	End	Lead	30	6	13	20	27	5	12	19	26	2	9	16	23	30	7	14	21	28	4	11			
Final Workplan	2/13/2012	2/20/2020	GP/ CRg																							
MOU Signed by Client	2/13/2012	2/2/2020	MP																							
Work Plan Assessment #1	3/5/2012	3/12/2012	XX																							
Project Report #1	3/5/2012	3/12/2012	XX																							
Quarter Faculty Debrief	3/12/2012	3/19/2012	XX																							
Self/ Peer Assessments	3/14/2012	3/21/2012	XX																							
Draft Report	4/16/2012	5/16/2012	XX																							
Class Presentation	4/21/2012	5/21/2012	XX																							
Public Presentation	4/21/2012	5/25/2012	XX																							
Work Plan Assessment #2	6/4/2012	6/11/2012	XX																							
Faculty Debrief	6/4/2012	6/11/2012	XX																							
Final Report	5/16/2012	6/11/2012	XX																							

ORCA PlanningWorkplan																													
Garrett Phillips, Colin Rowan, Collin Roughton, Allison																													
		March				April				May				June															
Age Friendly Planning Project		20	27	5	12	19	26	2	9	16	23	30	7	14	21	28	4	11											
I.	Project Planning																												
Problem Definition & Scoping																													
Final Workplan/ MOU																													
Signed MOU																													
I.	Visioning																												
Plan for Creating the Vision																													
Initial Research and Analysis																													
Initial Public & Stakeholder Discussion																													
Draft Vision																													
Public/ Stakeholder/ BPS Feedback																													
Final Vision																													
I.	Policy Recommendations																												
Plan for creating Policy Recommendations																													
Research and Data Analysis																													
Draft Recommendations																													
Public/ Stakeholder/ BPS Feedback																													
Final Recommendations																													
I.	Final Product																												
Draft Product Development																													
Draft Product Delivered																													
BPS Feedback																													
Final Product Delivered																													