

RESHAPING THE PLANNING AGENDA:

TRAINER'S MANUAL

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Overview

This training has been designed to inform and inspire older adults to engage in planning. It is a four-hour training that includes an overview of the Oregon planning system, three scenarios related to transportation, land use, and housing, and a lunchtime presentation that provides examples of older adults planning efforts from around the country.

The training was created specifically for participants in Clackamas County, but it is broad enough that it can and should be adapted to the local context of wherever you hold the training. The ideal size of a training group is around 20 participants, but it can be used with a group as small as four and as large as your room can hold. The training is specifically geared towards older adults; this is a diverse population that can include people in their late 40s and older.

This manual provides suggestions for organizing the training, as well as instructions for how to lead each of the training sections. There is an accompanying manual for participants that includes broad information about the Oregon planning system and was created for their use during and after the training.

Part 1: Logistics

I. Organization

A. Picking a location

The training has been designed so that it can be used in classrooms, boardrooms, community centers, and other venues that provide a comfortable setting for older adults. When thinking about a location, you will want to consider how accessible it is by various forms of transportation, including public transportation. Most communities have facilities that are both conveniently located and that offer free or reduced fees for non profits.

It is always advisable to visit a location ahead of time to determine what extra supplies or resources you might need to host the training there. Among the questions you should try to answer in advance:

- Is it easy to find?
- Where is parking available?
- Will signage be needed to help participants locate the classroom?
- Is the classroom equipped with a projector/screen and whiteboard/chalkboard?
- What technological equipment and support is needed?
- Can tables be moved around?
- Is the room large enough to accommodate the maximum number of participants?
- Can 3M post-its be posted on a nearby wall or will easels be required?
- Where are restrooms located?
- Is the space quiet? Will the acoustics of the room interfere with participants' ability to hear?
- Are the chairs comfortable?

B. Recruiting Participants

There are a variety of avenues that can be taken to recruit participants for the training including: word-of-mouth, listservs, advertisements at senior centers and in their newsletters, libraries and other public locations, government and newspaper community calendars, neighborhood associations, and paid advertisements in newspapers. When exploring your recruitment options, it may be helpful to speak directly with social service providers, senior centers directors, and other individuals who work closely with older adults. In addition to asking them to share information about the training with their networks, you should ask for recommendations for other people to whom you can send the training notice.

How far in advance should you begin your recruitment efforts? That will depend on your targeted audience and the logistics of your training. In general, you will want to have an announcement ready for distribution at least three weeks in advance of your scheduled training date.

Many community centers and public facilities can advertise the training if you provide them with a flyer announcement. When developing the flyer, remember to include the following details:

- What the event is about
- Purpose
- Goals
- Who's the targeted audiences
- Date, time, location
- Other logistics such as food and transportation
- How to RSVP
- How to get more information or where to direct their questions

An example of a flyer notice is included on page 6.

C. Registration

Establish a phone number and email for registration. A voicemail may be set up to receive registrations when you are not available to receive calls. The voicemail message should state who is holding the training, the training date and location, a request that registrants leave their name, phone number, indicate whether they require transportation assistance and any dietary restrictions for their lunch order.

Call or reply to emails confirming registration. If not explicitly stated, double check if the participant requires transportation assistance or has any dietary restrictions. A few days prior to the training, call or email each registrant as a reminder.

Provide a detailed map (campus, parking) with directions to the training room. This can be emailed to participants, posted online, or posted through the mail.

D. Transportation

If you have the resources, offering transportation assistance is one way to making sure your training is accessible to all people. Transportation assistance could be in the form of reimbursement for fuel expenses or transit fares, or it could mean helping to arrange carpools. In the Portland metro area, Ride Connection (www.rideconnection.org) can help to pick up individuals and groups. Social service agencies may also be a resource for arranging transportation. Remember to choose a training location that is easy to access by car and transit.

E. Catering

The training has been created so that participants have at least one meal. This is not a requirement, but it is helpful to attract participants and to keep them engaged in the training. When planning for meals and snacks try to accommodate dietary needs (e.g., vegetarian, low-sodium). Meals that are healthy are preferable. Arrange to have beverages available when the participants arrive. It is always a good idea to arrange for a few extra meals in case you have unregistered participants show up on the day of the event.

*Accessible housing and public transit, as well as nearby services and amenities, provide the ingredients for successful aging without the need to move **

**Does *your* community have what it takes
for *you* to successfully age there?**

Come to a **FREE** training on transportation, land use and housing planning, designed specifically for older adults!

Monday, May 10th from 10am - 2pm
McLoughlin Hall #254 at Clackamas Community College
19600 Molalla Ave., Oregon City, Oregon

Includes lunch and a raffle, free! Transportation assistance is available.

Leave with a better understanding of things like: the importance of planning for an aging society, how your city and county planning systems work, and the best ways you can advocate for the things you'd like to see in your community. Ensure that your voice is heard by local decision-makers.

To RSVP to the training, please contact us at (503) 342-2071
or by email at info@sageplaces.com by May 4, 2010.

Training provided by graduate students from Portland State University's Master of Urban and Regional Planning Program (Sage Places). For additional information visit our website at www.sageplaces.com

*AARP 2010



II. Setup

A. Training Materials

The following is a checklist of materials that should be brought to the training. Some items, such as an overhead projector, may be provided by the training facility. You should check ahead of time to determine what materials you will need.

- Computer
- Projector
- Turning Point polling technology (www.turningtechnologies.com)
- PowerPoint presentations*
- Facilitator scenario sheets
- Chalkboard/Whiteboard or large flip chart
- Markers – enough for each small group (bring extra)
- Dry erase markers/ Chalk
- One 3M Easel Board Post-it package or one flip chart for each small group
- Sign-In sheet (*pre-fill registrants names for faster sign-in*)
- Box of pens or pencils
- Name tags (pre-fill for faster sign-in)
- ½ -inch binders with clear cover sheet for cover page
- Training binder inserts
- Evaluation sheets
- Time count down signs to keep presenters' time in check
- Signs (to locate classroom)
- Masking tape
- Scissors
- Stapler
- Watch
- Easel for each small group (depends on room setup)
- Planning reference materials (optional)
- Raffle prize(s) (optional)
- Raffle tickets (optional)
- Facilitator business cards (optional)

* Adaptable PowerPoint files are included in an enclosed CD-ROM

B. Arranging the Room

Plan to give yourself at least one hour to arrange the room prior to the training. Hang signs to direct participants from the parking lot(s)/transit stop(s) to the training room. If staff members are available, position people 30 minutes prior to the training to help participants locate the room.

Arrange seating so that participants are seated in small groups but can all see the presentation screen. Place several 3M easel sheets or flip chart with pens at each small group (group sizes generally work best with 4-6 participation). Test the PowerPoint and Turning Point software to make sure that the technology works. Set up an registration area near the entrance of the room that includes a sign-in sheet, name tags, and training manual binders.

If refreshments are provided, set these up on a table towards the rear of the room where participants can conveniently access it without disturbing others.⁸

Training Registration

First Name	Last Name	Signature	Would you like to receive information about		If you would like to receive information from Housing Land Advocates or AARP, please provide your mailing or email address below.
			Housing Land Advocates?	AARP?	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	
			Yes No	Yes No	

Reshaping the Planning AGenda
May 10, 2010
Training Evaluation

- 1) How would you describe yourself? (Please check all that apply)
- | | |
|--------------------------|-------------------------|
| Interested Citizen | Educator |
| Advocacy Group Member | Other (Please Specify): |
| Planner | _____ |
| Social Services Provider | |

- 2) How did you hear about this training?
- Boom! Boomers & Beyond Newspaper Advertisement
- Invitation in the Mail
- Invitation by Email
- Community Center
- Senior Center
- Housing Complex
- Clackamas Community College
- Neighborhood Association or CPO
- Advocacy Group (AARP, HLA, Elders in Action, etc.)
- Flyer at Public Location
- Church
- Sage Places Website
- County/ Metro Event Calendar
- Family/ Friends
- Other (Please Specify): _____

- 3) What is your age? _____
- 4) What is the zip code of your residence? _____
- 5) What motivated you to attend this training?
- Interest in planning Free Lunch Opportunities to network
- Others: _____

- 6) Would you recommend this training to your peers?
- Yes No

Why or why not?

7) Please rate your satisfaction with the following aspects of the training:

	Not at all Satisfied	Not Satisfied	Neutral	Satisfied	Extremely Satisfied	Don't Know
What is Planning?						
Lunch Slideshow						
Scenario Discussions						
Overall Training						

8) How do you feel about the length of this training?

Too Long Just about right Too Short

9) What would you change or add to the training?

10) Is there content you felt was missing that should be covered in future trainings?

11) May we contact you for some follow-up questions regarding the evaluation of this training?

Yes. Please provide us with your contact information

Name: _____

Phone/Email: _____

Address: _____

No.

III. Facilitating the Training

The number of facilitators you will need depends on the size of your training. You will need a minimum of one person to present the introduction presentation, one person to make the overview of planning in Oregon section, and one person to present during lunchtime. All three of these sections require a least a basic knowledge of the Oregon planning system. It is advised that the facilitator(s) for these sections read through the training manual in advance so that they can direct participants to additional resources and so that they can answer any questions that may arise.

For the three scenarios, you will want one facilitator to lead the general discussions and one facilitator at each of the small groups to lead the breakout sessions. If you do not have enough staff to facilitate each group, the main facilitator can roam around and make sure that each group is staying on topic and that the discussions are flowing. The main facilitator can also serve as the time keeper.

When facilitating the training, you will want to gage the experience level of the participants in the room. This can be done during the introductions. The training is geared towards individuals with little to no previous experience in planning. If you do have participants that are more experienced, you may want to tell them up front that some of the training will be a review for them. You can also try to solicit stories and feedback from the more experienced participants to reinforce what you are trying to teach.

Section 2: The Training

IV. Introduction Presentation

Length: Approximately 30 minutes depending on number of training participants

Materials: 1.) PowerPoint Presentation projected on a screen.
 2.) A whiteboard or flip chart
 3.) Optional: Print the PowerPoint and include in training manual.

Room setup: Arrange chairs so that participants can see the PowerPoint screen and so that everyone is sitting next to at least one other person. Ideally, participants will be seated in the groups that they will work with during the planning scenario activities.

Purpose:

- 1) To set the stage for the workshop by encouraging participants to think about how planning plays a role in their everyday lives.
- 2) To allow participants to introduce themselves and to learn about the trainers
- 3) To provide an overview of the agenda and logistics

Introduction: Slide 1

Welcome



photos: edmunds.com, stringbot, freemove.gov



Reshaping the Planning AGenda
Training
Monday, May 10
Clackamas Community College

Trainer Notes: Introductory slide that is on screen when participants arrive.

Introduction: Slide 2

What did you do this morning?

Trainer Notes: Welcome the participants. Let them know that there will be introductions in a couple of minutes and you will go over the logistics and agenda as well, but that you are starting with a quick exercise to start the day. Tell them that with all of the exercises that they will be taking part in today they should feel comfortable voicing their thoughts and that there are no "wrong" answers.

Ask participants to think about their morning before they arrived at the training. Encourage them to think about everyday activities such as brushing teeth and taking out the garbage. Give them about a minute to think about it themselves and then bring it back to a larger discussion.

Start the conversation with prompts like:

Where did they start the day?
How did they travel to the training?
What did they see along the way?

As they offer answers, write down on chalkboard or flip chart.

Introduction: Slide 3

Planning Impacts Everyday Life



Trainer Notes: It is ok if not everything they did is related to planning, but try to associate most of participants' everyday activities with planning. For example:

- The water you used to brush your teeth is the result of planning for utilities.
- The food on your table is tied to the urban growth boundary.
- Your house is in a land zone.
- The roads you traveled on were planned.
- The commercial properties you passed have undergone inspections and might zoning codes.
- The building you are sitting in is the result of planning.
- The rivers you might have passed and the parks that you saw also result from planning.

The main message is that we might think that planning is essential to our lives, but on a daily basis it impacts us in ways that we don't even think about.

Introduction: Slide 4

Planning Impacts You



Trainer Notes: Planning helps to guide the parks and natural areas where you recreate and relax. It protects the farmlands where your food comes from. It contributes to the design and implementation of the infrastructure you use to walk across the street or to take your grandchildren to school.

Main message: It impacts you right now. It will impact you as you grow older.

Planning Impacts All of Us



Trainer Notes: Planning can also negatively impact your lives. Poor planning can make it difficult for you to get around to where you need to go. It can contribute to the desecration of the environment. It can lead to poor health outcomes and it can contribute to communities that lack social cohesion.

For these reasons, it is important to get planning right. It is important that the planning that takes place in your community reflects the values and visions of you and your neighbors. It is important, especially as you get older, that planning takes into account the special requirements you might need to continue to live healthy, happy, and active lives.

And that is why we are here today. We want to have a discussion about planning, your involvement in it, and how you can be an advocate for your housing, transportation, and community needs.

Three Goals of this Training

1. To better understand how planning works
2. To better understand how planning impacts all of us
3. To increase awareness of how you can impact planning

Trainer Notes: Discuss the three goals of the training. Let the participants know that we will revisit these goals at the end of the training and that they can provide feedback as to whether these goals were met or not.

Introduction: Slide 7

Agenda

10-10:30	Introductions
10:30 – 11:15	Overview of Planning
11:15 – 11:45	Transportation Activity
11:45 – 12:15	Lunch & Presentation
12:15 – 1:00	Housing Activity
1:00 – 1:45	Visioning Activity
1:45 – 2:00	Wrap Up & Evaluation

Trainer Notes:

- 1.) Walk the participants through the agenda.
- 2.) Discuss logistics such as where the restrooms are located.
- 3.) Set the ground rules for the training:
 - a). There are no wrong answers
 - b). Listen to others when they are speaking
 - c). When in groups, everyone should have an opportunity to express their views
- 4.) Walk the participants through the training manual. Let them know that we won't be able to cover everything today and that the manual is designed to provide additional information and resources.

Project Background



Trainer Notes: Sage Places is a group of students in the Master of Urban and Regional Planning program at Portland State University. As part of a final workshop project, we were asked by Housing Land Advocates to develop a training that would provide older adults with tools to more effectively advocate for their needs in planning. Housing Land Advocates is a non-profit, volunteer-driven, advocacy organization dedicated to using land use planning and the law to address affordable housing conditions in Oregon. This is accomplished through legal representation and advocacy, technical assistance, and education on land use matters affecting affordable housing to local governments, interest groups, affordable housing providers, land use policy makers and planners. Formed in 2004, HLA has focused on the enhancement and enforcement of land use, economic development and workforce policies to enable Oregon households of all income levels to be able to obtain adequate housing.

For the past five months we have been talking with older adults and planners throughout Clackamas County. We've been to Sandy, Estacada, Molalla, Lake Oswego, Clackamas Town Center, and other parts of the County. We have listened to how older adults take part in planning and how planning is/isn't capturing opportunities in their lives. This workshop has been developed based on these conversations and on our research.

Introductions

1. Name
2. Where do you live?
3. Any prior experience with planning?

Trainer Notes: If there are 15 participants or less, have participants interview the person sitting next to them and then introduce the person sitting next to them to the class.

If there are more than 15 participants, just ask for names and where they are from.

If there are participants with lots of experience with planning, let them know that the training might be a review for them, but that their experiences can help others to learn.

How to use the polling units



- The polling units work like a remote control or telephone key pad
- Simply push the number button to vote
- If you accidentally hit the button a second time, the computer will NOT count your vote twice
- The results will automatically be tallied and displayed on the screen
- **Your individual answer will not be displayed**

Script:

Let's begin with reviewing how to use the technology.

How many of you have used a similar technology before? For those who haven't, if you have watched "Who want to be a millionaire?" on TV, then you know have seen how it works.

Each person should have a polling unit. Do not to pick up your unit till we have completed this slide. We will be doing a couple of practice slides to make sure we are all familiar with how the technology works.

Review slide.

Continue Script

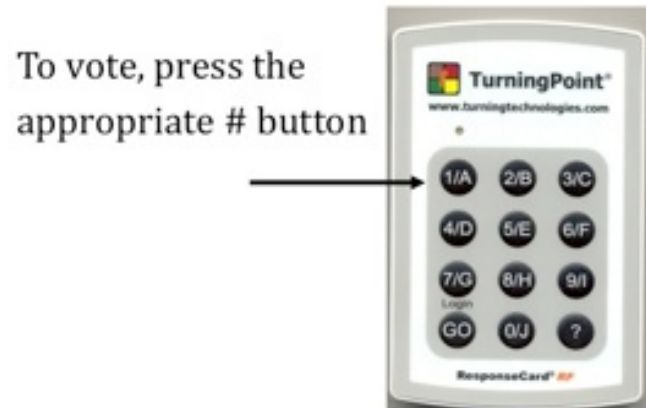
When our program is complete please **RETURN** your polling unit

Place polling units in the basket on the table

Your polling unit will not... turn off your tv, open your garage door, or make the dog quit barking.

Please remember to return it to us, so we can use it in future meetings

Introduction Slide 11



Polling Unit Tips:

- When activated, the number of people who have cast their vote will show up on the upper right corner of the slide.
- When the majority of people have finished voting, pressing ENTER on the laptop computer will stop the polling.

Practice Question:
Are you a member of AARP?

1.Yes

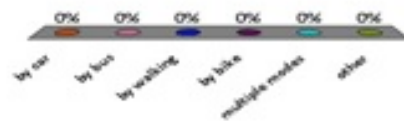
2.No



Introduction Slide 13

Practice Question: How did you get here today?

1. by car
2. by bus
3. by walking
4. by bike
5. multiple modes
6. other



--- End of Introduction section--

V. Overview of Planning Presentation

Length: Approximately 45 minutes

Materials:

- 1.) PowerPoint Presentation projected on a screen.
- 2.) Interactive polling technology (or pieces of paper that people can hold up to cast their votes during polling exercises)
- 3.) A chalkboard or flip chart
- 4.) Optional: Print the PowerPoint and include in training manual.

Room setup: Arrange chairs so that participants can see the PowerPoint Screen.

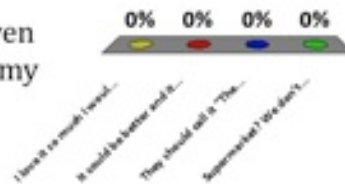
Purpose:

- 1) To provide participants with a broad overview of the basics of planning in the State of Oregon.
- 2) To get participants thinking about the role planning can play during their later years in life.

Overview of Planning Slide 1

Which of the following best describes your local supermarket?

- A. I love it so much I would move in there if I could.
- B. It could be better and it could be worse.
- C. They should call it "Theftway" instead of "Thriftway"
- D. Supermarket? We don't even have a lemonade stand in my town.



Trainer notes: Begin by having participants practice using the interactive polling technology. Start with simple questions, like: Do you live in Oregon? Yes, No. How did you get here today: car, bus, walked, other. After a few practice rounds, jump into the question above.

After they answer, comment on the most commonly chosen answer. Then explain why the question was asked:

Everywhere we went to talk with people about planning the issue of supermarkets arose. People care about where they shop and what they can get there. Alas, as future planners we are here to break some news to you. We can't get a Trader Joe's or New Seasons or a Fred Meyer in your town. Those are decisions made by private businesses. But those decisions can be influenced by planning. Planning can impact the amount of land that is available for a supermarket as well as where such stores can be located. Planning can impact how the supermarket looks and how much parking it has.

Citizens such as yourself can influence the planning and this can ultimately lay the groundwork for changes in your community such as changes in the type of services that are available to you.

What is Planning?

The dictionary says: "Planning is the act of making and carrying out plans; specifically the establishment of goals, policies and procedures for a social unit."

Trainer Notes: Before clicking through to the definition ask participants: What is planning?

Read the dictionary definition. Does that make any sense? A little but it is not entirely clear and in fact planning is not an entirely clear thing. It means different things to different people. For some, planning is the determining and drawing up plans that determine the built environment like houses, roads, and parks. For others, planning is a process that tries to determine the future condition of a community. For others, planning is the bureaucratic red tape that slows down the development of a new business or it is the process you need to go through to add an extra bathroom to your house.

In fact, planning is all of these things. It is both a way for communities to come together to determine their vision for how they would like to grow and exist in the future, and it is a way to regulate what currently exists. The future planning is what we call **comprehensive planning**. This is done by the state, regional, county, and local governments. Comprehensive plans are far looking. They often deal in time periods like 20 years in the future. 20 years from now we will have housing in this location, roads leading here, and parks here. These plans are often idealistic, but they are important. They provide the framework under which other plans and planning efforts fall. They are the blueprint for your communities.

The other type of planning, **current planning**, might feel more tangible. It involves the permits you need to make changes to your property. It is the regulations that govern how we use and protect our lands. And, yes, current planning involves zoning. Zoning is often what people associate with planning.

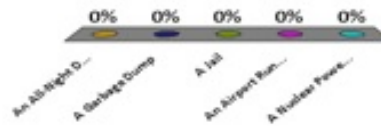
Use recent examples from Clackamas County (or the community in which the training is taking place) to illustrate planning:

1. Has anyone taken the new Max Line from Clackamas Town Center? That involved years of planning.
2. Has anyone heard the talk about urban and rural reserves? That is long-range planning by Metro and the Counties
3. Anyone know when Clackamas County last did a Comprehensive Plan? It was updated in 2001 with a vision toward 2020.
4. Any other examples of planning from your communities?

Overview of Planning Slide 3

Which of the following would you
most like to live next to?

1. An All-Night Disco
2. A Garbage Dump
3. A Jail
4. An Airport Runway
5. A Nuclear Power Plant



Trainer Notes: Have participants use poll technology again. Remind them there are no right or wrong answers.

Comment on what was selected.

Message: You wouldn't really want to live next to any of these things, now would you? And that is one of the reasons that we plan. We try to organize our communities so that different uses are compatible with one another. That is how planning originated. It started in places like New York City and London more than 100 years ago because people were living in cramped conditions next to factories and other unpleasant buildings. There were real health consequences. Cities decided that there needed to be a better way to organize homes, industries, shops, and other land uses.

Overview of Planning Slide 4

Why do we plan?

Because it is the law and because it makes sense

Trainer Notes: Ask: What other reasons do we plan? Possible answers: -- A. Coordinate resources B. Guide our future C. Express our hopes and ambitions D. Where are we? Where do we want to go? How do we get there? E. To decide how your taxes are spent.

Planning is essentially an organized attempt at community foresight. It seeks to guide the future conservation and development of an area within a framework of goals and policies consistent with physical constraints, legal requirements and attitudes and resources of the community. The basic aim of the planning is to organize and coordinate the complex interrelationships among people, land, resources, and facilities in such a way as to protect the future health, safety, quality of life and welfare of an area's residents.

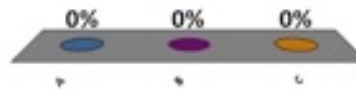
Oregon is famous in the planning world. It is famous because it has bold statewide legal requirements for planning. In the state of Oregon, all cities and counties are required to carry out comprehensive planning. These plans must be in accordance with the requirements and goals set out by the State's Land Conservation and Development Commission (LCDC).

Pause for a trivia break: For a chance to win an extra raffle ticket, how many statewide planning goals are there in Oregon? The first person to shout out the correct answer wins. Answer: 19 These goals address everything from agricultural and farming lands to transportation and housing options. They can be found on pg. 25 of your packet.

It is important to remember that there is a legal element to planning. Sometimes when you are dealing with a planner or working to change something into your community, you will run into legal barriers that may be difficult or impossible to overcome. Even if a planner agrees with you, he or she may be constrained by legal requirements. Even if a new trail that allows you to walk along a river to your town center is something that is desired, for example, there might be legal barriers in the way to making it happen.

Overview of Planning Slide 5

Which of the following is a planner?



Trainer Notes: Have participants answer the poll question. Reflect on their choices.

Answer: All of them. Planners come from all different backgrounds. It is a multi-disciplinary field. You might find planners who have worked as engineers, in the health care profession, former poets, etc. You'll find planners who work for local governments, county governments, and statewide agencies like the Oregon Department of Transportation. Planners also work for consulting firms. They may be based in Clackamas County but work on a housing development project in Connecticut.

Because planning is so wide ranging – environmental, transportation, housing, and land use – it tends to attract a wide range of people. Regardless of what types of planners you end up working with on an issue, you should know that planners often don't have the final say in decisions. They work under the constraints of the law and they often work under the direction of policymakers and politicians. They serve different clients including private businesses and developers. You are also their client and they should be responsive to you.

Overview of Planning Slide 6

Who Plans?

Planning is done at every level of government but it is mostly local

Trainer Notes: Who Plans? – The better question might be, who doesn't plan? At least that is the case here in Oregon where there are legal requirements for cities, counties, regions, and the state to coordinate planning efforts. While it might seem overwhelming that there is so much planning going on, the good news is that if you want a sidewalk in your neighborhood or if you think a road needs to be expanded you don't have to go to Washington, DC and knock on the door of the White House to make it happen. Planning is mostly local. It is mostly done at the city or county levels.

Draw a pyramid of planning with:

- Small federal level at top: Feds set regulations such as Clean Water Act. The federal government is also a big source of funding and with funding there often come restrictions about how it can be spent.
- Slightly bigger state level: State sets goals and requires coordination between governments
- Bigger regional level: Metro coordinates land use and transportation decisions between jurisdictions
- Bigger County level: County also coordinates land use, transportation and housing. It oversees the planning for unincorporated areas.
- Biggest local government: Cities develop transportation plans, land use plans, housing plans, climate action plans, parks plans, neighborhood plans etc.

Each level must be in accordance with the higher level of government, but there is great room for cities to develop their own visions plans. As a citizen you have a real opportunity to influence decisions at the local and county levels. Regional planning is a little more challenging, but your elected officials can play an important role there.

The important thing for you is to learn who is involved with the planning and to direct your efforts at those who are overseeing the planning process. This isn't always easy because knowing who has jurisdiction over various things is confusing. Look at our roads. All roads look pretty much the same, right? There's pavement and lines and signs. There might be differences in the number of lanes, but they are all very similar.

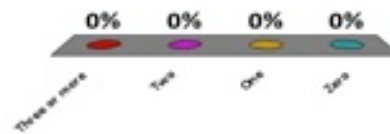
Roads are owned and operated by various levels of government. Interstate 5 is part of the federal system. McLoughlin Blvd is a state highway. Highway 224 is Clackamas County. The road in front of your house is probably maintained by your city. Knowing who is responsible for what is always a good first step. We have a list of contact resources in your pamphlet with phone numbers, email addresses, and mailing addresses where you can contact people to find out who is overseeing a particular project.

The following slides can be used to reiterate the levels of planning.

Overview of Planning Slide 7

How Many Famous Planners Can You Name?

1. Three or more
2. Two
3. One
4. Zero



Trainers Notes: Interactive Poll. If anyone answered that they know a famous planner, as them who the planner is.

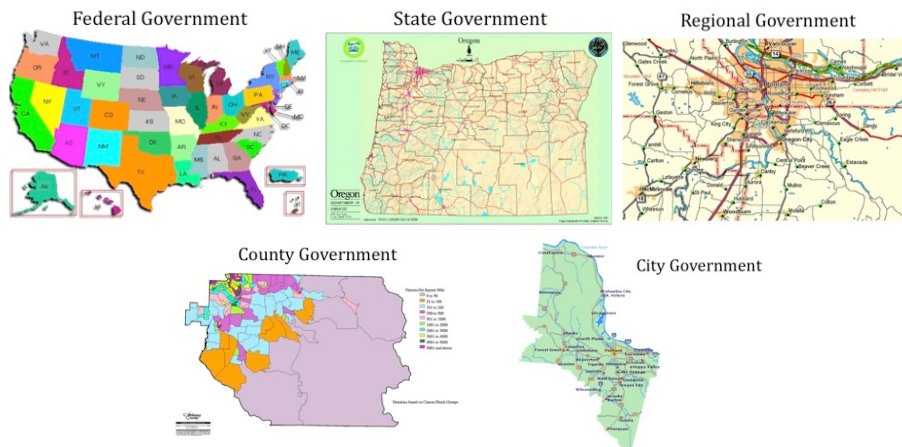
Message: Planning is not a profession where people gain fame or even really wealth. The average starting salary for planners in this area is around \$40,000 per year. Planners are not like politicians. They don't run for elected offices. Often the plans they help to develop barely include their name. Planners aren't famous because frankly the work is not about them. It is about the people they work for. Those people are YOU.

Overview of Planning Slide 8

The Best Planning is done by People Like
You

And there are many ways for you to
be involved!

It is important to get involved early
in the process!!!



Trainer notes: Citizen participation is what drives planning. You know best what you want your community to look like. You know what your neighborhood needs. You know what needs to be protected. You are the expert. The planner might have Census numbers or traffic statistics, but you have the experience of living in, working in and enjoying a place.

Citizen participation is not just a buzz phrase. It is the law. Remember those statewide planning goals? How many were there? 19. And the first one is Citizen Involvement.

Goal 1 calls for "the opportunity for citizens to be involved in all phases of the planning process." It requires each city and county to have a citizen involvement program containing six components specified in the goal. It also requires local governments to have a committee for citizen involvement (CCI) to monitor and encourage public participation in planning.

How can you get involved?

There are tons of ways and each is important.

Overview of Planning Slide 9



Trainer Notes: This is a generic planning process. Make sure to emphasize that not all planning processes are the same. Walk through a typical planning process and emphasize that these can take a long amount of time. Make a point about why it is important to get involved early. If you aren't part of the discussion early, your voice may not be as effective in the end.

Forms of citizen involvement:

You can serve on a planning commission

You can serve on an advisory committee (example: Clack Co. advisory committee on aging)

You can show up at meetings and make comments

You can testify in front of the planning commission

You can work with your neighborhood association or CPO to advance topics

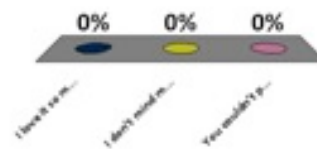
You can leave comments on draft plans via mail, phone, web, and in person

Some of the avenues for participation are listed in your manual.

Overview of Planning Slide 10

How much fun is it to move?

- A. I love it so much I would move every year if I could.
- B. I don't mind moving.
- C. You couldn't pay me enough to want to move.



Trainer Notes: Have participants do the poll. Reflect on their answers.

Message: One of the reasons that we have been involved with this project is that we are interested in the concept of aging in place. This basically means being able to stay in your current residence as you get older. For many of us, this is difficult. Think about an elderly neighbor or relative that you know who has had to move from their home for whatever reason. It is difficult. It is undesirable. It is a hard thing to do at any age.

There are things that can be done to help make it possible for people in your community to age in place. Some of these can be addressed through planning.

Planning for an aging population

We have different opportunities as
we get older

Trainer Notes: One thing we have heard a lot about as we have talked with people around Clackamas County is that very few of us are actively planning for our golden years. We might have a financial planner or a plan to make sure we can get by with our social security and savings, but we aren't asking ourselves difficult questions like: "what will I do if I can no longer drive?" or "where will I live if my current home no longer allows me to live a fulfilling life."

We believe that it is not only important for individuals to prepare for their future, but for our communities to prepare as well. You all know about the Baby Boom phenomenon. This year the first baby boomers turn 65. This will have a dramatic impact on our communities. In Clackamas County, it is estimated that 20% of the population will be over the age of 65 in the year 2020. That means the planning that is being done today will have a huge impact when the age boom is at its peak.

What might this mean for how our communities are planned? Do you think that older adults require a built environment – roads, housing, services – that are different than what exists today? How can we use the tools of planning - zoning, design, architecture, and public involvement – to shape communities so that people in their golden years can get where they need to go safely, live healthy lifestyles, and have access to the services they need to live meaningful lives?

Trainer Notes: Ask participants: Think about yourself or maybe your parents or people who are older than you. What would make your lives or their lives easier? Does your current community facilitate living in the golden years? If not, how would you change it.

Talk about the upcoming scenarios and how they are designed to get the participations thinking about the future.

-- End of Overview of Planning Presentation --

VI. Scenario 1: Transportation

Length: Approximately 45 minutes

Materials: 1.) Flip charts or post-it paper
 2.) Markers
 3.) Tape

Room setup: Arrange chairs so that participants are seated in groups of 4-6. Each group should have a flip chart/post-it paper and markers. If possible, have one facilitator at each group in addition to a main facilitator who reads the scenario, keeps track of time, and leads the debriefing at the end of the small group activity.

Purpose:

- 1) Understand why accessible and affordable transportation is important to older adults.
- 2) Understand how regional, large-scale transportation project decisions are made (the funding streams, regional priority setting/RTPs, the timelines, etc.)
- 3) Understand what planning bodies are involved in local transportation decision-making and the role that Metro plays in long-range planning.
- 4) Understand how street design decisions are made and by whom.
- 5) Understand the most effective ways to advocate for a transportation amenity/change in one's community.

(Read aloud scenario).

Suppose you watch your 4-year old grandson each Tuesday morning while his mother takes a class. You often take him places like the mall or the park because he gets bored staying at your house all morning. Your daughter suggests you try walking to the park next week since the weather is getting nicer. It's only about half a mile away. However, there's a busy street you have to cross to get there and you've never liked doing this. "The walk signal is not timed for an older person like me. I just can't get across in the amount of time allotted and it makes me nervous that cars will have to wait for me." Is there anything you can do?

Small Group Facilitation: Ways to Address Transportation Concerns in Your Community

Debrief

Now, let's reconvene and talk about the things that came up during your small group discussions. Group responses into the following categories:

- (I) Information gathering
- (O) Outreach
- (A) Action

VII. Lunchtime Presentation

Length: Approximately 20 minutes

Materials: 1) PowerPoint Presentation

Room Setup: Arrange chairs so that participants can view the PowerPoint screen. Set up food and drinks toward the back of the room to minimize disruptions.

Purpose:

- 1) To introduce participants to other older adult planning efforts from around the U.S.;
- 2) To have participants exposed to new housing, land use, and transportation possibilities;
- 3) To broaden understanding of what planning for older adults can look like.

Lunchtime Presentation Slide 1

What Can Planning Do for You?

Examples from Across the Country

Trainer Notes: While you're enjoying your lunch, we're going to spend a little time talking about some of the efforts that have been taking place around the country that are related to planning and aging. This is just a very tiny fraction of the exciting projects and processes that have been happening, but we hope it gets all of us thinking creatively about possibilities for the rest of the afternoon sessions.

**Affordable Senior Housing with Nearby
Amenities & Services**

Seattle, Washington

Lunchtime Presentation Slide 3



Trainer Notes: In Seattle, WA, a local, non-profit developer worked with older adults to create Courtland Place, an affordable housing development that is designed to meet residents' daily needs and revitalize the neighborhood at the same time; the development includes an onsite gym, rooftop garden, and community room, and there are several amenities nearby, including a shopping center previously developed by the same group. Three bus lines and two light rail lines run near Courtland Place.

There's a grocery store and pharmacy within a block; restaurants, retailers, a cultural center, a community garden, and parks within a mile; and a senior center, medical services, and a movie theatre within two miles.

Photos: urbanliving4seniors.com

Lunchtime Presentation Slide 4



Trainer Notes: Courtland Place is just one of four phases of development – two of which aimed at older adults. Rainier Court is the other phase for older adults; the project is permitted but delayed due to funding delays.

The creation of these developments involved several planning topics. The area’s comprehensive plan designation supported the project in two ways: the “urban village” designation allowed for high density and the “distressed district” designation made development in the area a priority for funding. Other relevant planning issues included:

parcel assembly – the city worked with previous property owners and the developer to put together a large enough piece of land to make the development financially feasible,

brownfield reclamation – brownfields are pieces of land that have a history of industrial or commercial uses that may have introduced hazardous materials or pollutants to the land; a clean-up process must happen before the site can be redeveloped,

and accelerated permitting – the city helped speed up the process for the developer in order to make it easier for the project to “pencil out.”

Citizens had opportunities to advise City Council and the EPA during the development process.

This type of housing development is just one example of the huge variety of possible housing options that exist outside of just single family, large lot homes and nursing homes. Closer to home, Benton County’s planning department is working with their public health department to examine the health impact of one type of housing option, accessory dwelling units – which you may know by the not-so nice names of mother-in-law or granny flats. These are not currently allowed in rural areas, but some residents are interested in building them to provide extra options for aging family members or a space for caretakers to live.

Image: SouthEast Effective Development

Lunchtime Presentation Slide 5

Visitability Ordinance & Practical Housing for All Initiative

Arvada, CO
City of Fort Collins, CO

Trainer Notes: Two cities in Colorado used two different methods to support the development of housing that makes aging in place easier.

Lunchtime Presentation Slide 6



Trainer Notes: Arvada, Colorado passed a Visitability Ordinance that **requires** that 15% of new dwellings must be visitable or visitable adaptable and that an additional 15% must have visitable interior features.

One important feature of visitability is a no-step entrance to the house with no-to-very-small slope. This feature is helpful for those with mobility devices, residents carrying groceries, moving in new furniture or other heavy items, just to name a few. This is an example of a multi-family development, where the first floor units have no-step entrances.

Photo: <http://www.flickr.com/photos/paytonc/322032042/>

Lunchtime Presentation Slide 7



Trainer Notes: The City of Fort Collins, Colorado decided to use a different approach. Their Practical Housing for All Initiative encourages developers to build homes that provide basic accessibility. The initiative covers many of the same basics as the Arvada ordinance but does not mandate compliance. Instead, the initiative relies on incentives and the market to provide accessible housing.

As in Arvada, interior accessibility features include: a first floor kitchen, bathroom and a room that can be used as a bedroom; and maneuvering space (which is helpful not just for those in wheelchairs - parents with strollers will have an easier time maneuvering, too, for example).

Photo: <http://www.flickr.com/photos/ncstate-news/2570536834/>

Lunchtime Presentation Slide 8



Trainer Notes: In the bathroom, a roll-in shower, supportive rails, and an easily accessed sink are examples of visitable and practical housing features.

Photo: <http://www.flickr.com/photos/nancyhugo/2526306957/>

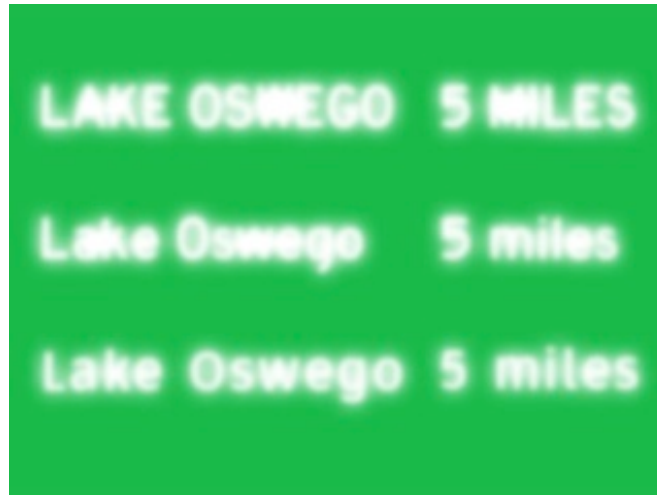
Lunchtime Presentation Slide 9

Senior Friendly Zone

Atlanta, GA

Trainer Notes: Atlanta created senior-friendly development guidelines & a senior friendly zone as part of their Metro Vision 2035 plan. Implementation of the zone was subject to funding, and it has not been implemented yet. The zone would set rules for speed limits, street geometry, sidewalk development, pavement markings, traffic signals, and transit stops, among other things.

Lunchtime Presentation Slide 10



Trainer Notes: Don't worry if this looks blurry to you – it should look blurry to all of us! But if research is right, that bottom line should be just a bit easier to read. This is what a highway sign might look like at night for someone with slightly impaired vision. While Atlanta's senior zone addresses signage, it doesn't promote this bottom typeface, even though the federal highway folks have approved it for use. This is just one example of how planning efforts can benefit from the experience of older adults and from research about older adult needs.

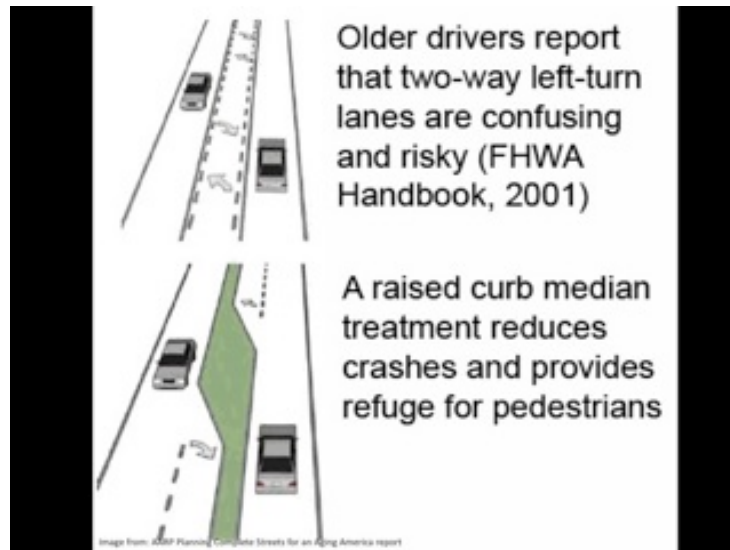
Lunchtime Presentation Slide 11



Trainer Notes: Here's another example. The senior friendly zone also addresses turn lanes, but it only requires that design be consistent with another plan, the Connect Atlanta Plan. This plan advocates for the creation of a middle turn lane, like the one seen here, especially on streets that otherwise only have two lanes of traffic going in either direction. How safe do you think you'd feel in this situation?

Photo: <http://www.flickr.com/photos/fredthechicken/752908760/>

Lunchtime Presentation Slide 12



Trainer Notes: According to the federal highway administration, those two-way left-turn lanes are difficult for older adults to navigate. A raised curb median, as seen in the bottom drawing, would benefit older adult drivers and other road users.

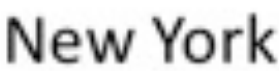
Even a plan that focuses on older adult needs may prove ineffective if it does not take into account the most recent research or does not allow planners flexibility to respond to new findings.

Locally, some of the folks we interviewed during our research pointed to Lake Oswego's 50+ visioning effort as an example of a great process that fizzled when it came to implementing ideas.

But even when implementation is delayed or imperfect, there are still benefits when older adults are actively involved in the planning process. For example, in Lake Oswego, although implementation of 50+ seems stymied, the process brought a lot of folks together, and many have worked to carry out the vision through non-city channels.

We also learn from what happened in other places and in previous efforts, so what you do may have benefits even beyond your own community.

Lunchtime Presentation Slide 13



New York

Trainer Notes: In 2008 Mayor Bloomberg launched Safe Streets for Seniors “to reduce traffic fatalities among seniors”.

Lunchtime Presentation Slide 14



Trainer Notes: The city identified “senior zones” – areas with a high density of older adults and with a high number of pedestrian accidents or injuries.

Efforts will vary in each of the identified senior zones but may include: retiming lights and pedestrians signals, refurbishing signs, improving pedestrians islands, and narrowing lanes to slow traffic.

Here on Vanderbilt Avenue, a raised median and the conversion of a lane of traffic to a bike lane & parking created some substantial benefits:

Since implementation, there has been a:

- 21% decrease in average speeds
- 64% decrease in number of speeders
- 22% reduction in injuries since implementation

Photos from: presentation to Bronx Community Board 11

Pelham Gardens Safe Streets for Seniors Program

New York City Department of Transportation

Office of Traffic Planning

June 9, 2009

Lunchtime Presentation Slide 15



Trainer Notes: Here, just the creation of a striped bike lane defined the road more narrowly. Since implementation:

- 20% decrease in average speeds
- 50% decrease in number of speeders
- 25% decrease in pedestrian crashes

Both of these projects took place in areas that were identified as being heavily used by seniors, but the changes have had important benefits for all road users and pedestrians.

There are several other areas throughout the nation with similar initiatives, but many have been postponed or hampered due to a lack of funding.

Photos from: presentation to Bronx Community Board 11
Pelham Gardens Safe Streets for Seniors Program
New York City Department of Transportation
Office of Traffic Planning
June 9, 2009

Sidewalk Ordinance

Naples, Florida

Lunchtime Presentation Slide 17



Trainer Notes: Situated on the Gulf of Mexico and just to the west of two large national parks and a state park, Naples Florida has experienced rapid growth in the last several years. About 42% of the area's residents were 65+ as of the 2000 Census. Historically, sidewalk development in the city was very limited – the city could only build sidewalks in residential areas with a request from neighbors.

Photo: <http://www.flickr.com/photos/milanboers/3506616007/>

Lunchtime Presentation Slide 18



Trainer Notes: But as the population continued to increase, especially the older adult population, city managers heard increasing demands for safe, walkable, and bikable neighborhoods. In 2005, the city adopted a new sidewalk policy that makes it easier for the city to complete the sidewalk network, especially along major roads.

Neighborhood activists and city staff worked with property owners along the major roads to win their support before the new policy went to City Council for a vote.

Two major planning topics were addressed in the creation of the ordinance: right of way development (in this case, the voting rules and the prioritization of projects) and a Master Plan (in this case, a Master Pathway Plan).

Citizens had the opportunity to testify to City Council about these topics.

End

These are examples of just some of the ways that different areas are planning for their aging population – often as a result of (and with the help of) citizen activists who get involved in planning.

All of these planning processes and developments aren't just good examples of planning for aging, though. These changes will benefit many other groups, from children, to parents, to road and sidewalk users in general.

Photo: <http://www.flickr.com/photos/digitalkunde/3494373862>

--End of Lunchtime Presentation --

VIII. Housing Scenario

Length: Approximately 45 minutes

Materials: 1.) Flip charts or post-it paper
 2.) Markers
 3.) Tape

Room setup: Arrange chairs so that participants are seated in groups of 4-6. Each group should have a flip chart/post-it paper and markers. If possible, have one facilitator at each group in addition to a main facilitator who reads the scenario, keeps track of time, and leads the debriefing at the end of the small group activity.

Purpose:

- 1) Discuss tangible methods for addressing housing supply issues in your community.
- 2) Understand the most effective methods for supporting or halting a proposed development.
- 3) Discuss the challenges that relate to providing services to suburban and rural communities.

(Read aloud scenario).

Suppose that over the last five years, you have had many friends and neighbors who have had to leave the community because they could not find the right type of housing. Most of them needed to downsize and were looking for smaller, single-story units that were affordable to someone on Social Security, but your community does not have much that fits that description. You are getting to a point where this is also a concern of yours. You do not want to leave your friends and family behind, but what are you to do?

Some of you may have already made similar decisions and changes in your lives. For those of you, what factors influenced your decision to move? Did you have to leave your community to find the type of housing you were seeking? Looking back, would you have done anything differently?

--

Like the transportation activity, we're going to work in small groups again to discuss this scenario. And just like the other scenario, there isn't a single right answer. After you've had a chance to talk with each other about ways to address this issue, we'll come back together to share some of our ideas with the rest of the group.

It's important to keep in mind that ultimately, housing in a community is largely driven by the private market. It needs to make sense for developers to build.

At the same time, there are a number of incentives (e.g. tax abatements, subsidies, etc.) as well as policy interventions that local governments can do to remove existing barriers (change restrictive zoning, streamline the permitting process, etc.) and encourage the development of certain housing types. You can advocate for these things within your local government.

Facilitating in small groups: Ways to Address this Housing Supply Issues

Possible Prompt:

We mentioned several things in her lunch presentation that other communities have done. Benton County, Oregon has recognized that some of their current zoning code inhibits the construction of certain housing types, like accessory dwelling units (mother-in-laws), so they are currently going through a process to update their code. We also mentioned an affordable housing development for seniors in Seattle where the local government was able to streamline the development/permitting process, helped collect parcels of land and in some instances waived fees. Together, these things made it less costly for a non-profit developer to construct affordable housing for seniors in an area that was desirable, close to many amenities and accessible to public transit.

Debrief

Now, let's reconvene and talk about the things that came up during your small group discussions.

Group responses into the following categories:

- (I) Information gathering
- (O) Outreach
- (A) Action

IX. Visioning Scenario

Length: Approximately 45 minutes

Materials: 1.) Flip charts or post-it paper
 2.) Markers
 3.) Tape

Room setup: Arrange chairs so that participants are seated in groups of 4-6. Each group should have a flip chart/post-it paper and markers. If possible, have one facilitator at each group in addition to a main facilitator who reads the scenario, keeps track of time, and leads the debriefing at the end of the small group activity.

Purpose:

- 1) Allow participants to identify specific things in their community that can be improved to allow residents to successfully age in place.
- 2) Have participants leave training thinking about what they would like to see in their communities.

(Read aloud scenario).

Think of yourself and your future. Think of your home. Think of how you get around, how you visit your friends and family, how you get to the store. Think of the places you like to go in your community.

Now imagine several years down the road, when you have a problem with your vision that prevents you from driving and you have had to have surgery on your knee, which makes walking up stairs or hills prohibitive.

Now think again about your life, your home, your community. Will you still be able to do the things you like and want to do? Will you be able to get around without driving a car? Will you be able to continue living where you live now? If not, are there other options in your community that will be able to accommodate your needs?

Facilitating in small groups:

What are the specific needs of your community? What is lacking? What can be improved? What would you like to see 10-20 years from now?

What works in your community, what doesn't? What might work?

What kind of urban form would work best? (For example, do you want to see more people walking and biking around in the community? If so, what is necessary? More parks? Commercial?)

What could make transportation possible or better in the community you live?

What are the opportunities and channels (such as social network, advocacy groups, schools, recreation centers, citizen groups) you can tap into for more resources or organize people who shared similar thoughts?

Debrief

Now, let's reconvene and talk about the things that came up during your small group discussions.

What are some of the things that you would like to change in your community?

If this room is full of planners, what would you tell them?

Has anyone discussed the opportunities for changes? How would you make these ideas happen?

I hope that this discussion has helped to spark some ideas on the specific things in your community you want to see changes. This can be a starting point for you to initiate a conversation with your friends, family, and various agencies that can help the community to achieve the desired outcomes and open up possibilities

X. Wrap Up

Length: Approximately 15 minutes

Materials: 1.) Evaluations
 2.) Raffle (optional)

Purpose:

- 1) To review what has been learned during the training;
- 2) To ask if the goals of the training have been met;
- 3) To highlight the training manual and participants' future participation in planning.