



Reshaping the Planning AGenda

Work Plan

Content

1. Project Overview.....	1
2. Project Background and Area of Study.....	2
3. Definition of Older Adults.....	2
4. Key Assumptions.....	3
5. Project Goals.....	3
6. Technical Advisory Committee.....	3
7. Stakeholder Groups.....	4
8. Methodology and Approach	
8.1 Phase I: Issues Identification & Outreach.....	5
8.2 Phase II: Advocacy and Planning Training.....	6
8.3 Phase III: Lessons Learned & Recommendations.....	7
9. Roles and Responsibility.....	8
10. Budget.....	8
11. Appendices	
Appendix A: Memorandum of Understanding.....	9
Appendix B: Work Breakdown Structure.....	13
Appendix C: Clackamas County Maps.....	16
Appendix D: Age Pyramids.....	18
Appendix E: Phased Work Plans	19
Appendix F: Project Schedule	24



1. Project Overview

Who We Are

Sage Places is made up of five graduate students in Portland State University's Master of Urban and Regional Planning (MURP) program. Our backgrounds are in transportation planning, public health, social work, and community organizing. We possess a diverse range of qualitative and quantitative skills. We are passionate about this topic and eager to work on a project that benefits our community.

The Client: Housing Land Advocates

Housing Land Advocates (HLA) is a non-profit, volunteer-driven, advocacy organization dedicated to using land use planning and the law to address affordable housing conditions in Oregon. According to the HLA website, 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 as OALUAH, 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.

Problem Definition

HLA and AARP Oregon have identified that the participation of older adults in the planning processes in Clackamas County is not leading to outcomes that address their needs. One potential barrier to advocacy is older adults' lack of understanding of the planning process. A better informed population of older adults will lead to more effective participation in planning processes and an increased ability to advocate for their needs. Another potential barrier may be the ways in which planners engage older adults in planning. Through better engagement strategies there will be better outcomes.

Final Products

The following deliverables will be completed by the end of this project:

1. A training program for teaching older adults about transportation, housing, and land use planning issues will be developed. The training will have place based elements specific to Clackamas County, but developed broadly enough for HLA and other organizations to adapt it for use elsewhere in Oregon;
2. An instruction manual that complements the training program, designed so that older adults and other advocates can lead their peers through the training and employ a "train-the-trainers" strategy of future engagement;
3. A lessons-learned document will be created to inform planners about how to best engage older adults in planning process.

2. Project Background and Area of Focus

Oregon Planning Goal 1 (*To develop a citizen involvement program that insures the opportunity for citizens to be involved in all phases of the planning process*) calls for widespread citizen involvement in all planning processes. One barrier to achieving this goal is that planning efforts are often complex, cumbersome, and intimidating. Without sufficient information about planning processes and the ways in which various planning decisions impact communities, citizens who want to be involved might find it challenging to know where to begin and how to advocate effectively. This is especially true for many older adults whose unique needs in areas such as housing, land use, and transportation are not always addressed through current planning practices.

Clackamas County, Oregon encompasses 1,879 miles and 14 incorporated cities in an area just southeast of the City of Portland. About an eighth of the land area in Clackamas County is considered urban, but the majority is rural (Clackamas County Consolidated Plan, 2006). Consistent with national demographic trends, Clackamas County will experience unprecedented population growth among older adults over the next few decades. The Population Research Center at Portland State University estimates that there are approximately 130,000 adults over age 50 currently residing in Clackamas County, and expect that number to grow to over 178,000 within the next twenty years (Appendix C and D). This demographic shift represents new challenges for planners as they seek out best practices for engaging older adults in local planning processes and plan to meet the needs of an older population.

3. Definition of Older Adults

Sage Places acknowledges that the term “older adult” is somewhat vague and that it commonly means different things to different people. For the purpose of this project, however, we have defined older adults to mean those who are 65 years and older. While the focus of this project will be on the identified needs of people over the age of 65, we will strive to include the visions and needs of those approaching this age or who self-identify as an older adult. Sage Places also recognizes that there is great variety of opinions, skills, and backgrounds within any age cohort, and that like most communities across Oregon, residents of Clackamas County face disparate challenges and issues.

4. Key Assumptions

Sage Places recognizes that we are operating under a number of assumptions, which may or may not be disproven as we move forward. These assumptions include:

1. Older adults may not fully understand the planning process and/or the implications on their daily lives, and therefore are not effectively participating in planning processes. Our assumption is that with a better understanding of the planning process older adults will be better able to advocate for their needs.
2. Planners may not be using the best tools to effectively engage older adults in planning processes.

5. Project Goals

1. Identify the current barriers to older adult participation in planning, as well as existing opportunities to increase knowledge and participation of planning issues.
2. Identify key issues faced by older adults in suburban and rural communities and provide older adults with the tools to effectively advocate for themselves.
3. Develop a training program that will improve older adults' understanding of land use, transportation and housing issues.
4. Provide planners with recommendations for how they can better involve older adults in planning processes.

6. Technical Advisory Committee

Sage Places has invited several knowledgeable professionals and advocates to share their input and expertise, through establishment of a Technical Advisory Committee (TAC). The unique nature of this project requires multi-disciplinary skills and expertise with a diverse set of issues – public participation, advocacy, curriculum development, housing, land use, transportation and gerontology – therefore, we have developed a TAC that is representative of a wide range of interests. TAC members include:

- Senior Transportation Planner and Clackamas County Liaison, Oregon Department of Transportation
- Case Manager, Milwaukie Seniors and People with Disabilities Services
- Director, Clackamas County Social Services Director
- Director of Community Engagement, AARP Oregon

- Citizen Involvement Coordinator, Elders in Action
- Board Member, Housing Land Advocates

Sage Places will utilize the knowledge and experience of these individuals to provoke discussion and solicit thoughtful feedback on our work. The TAC will meet once a month for 1-2 hours, beginning in February and continuing through May. In addition, TAC members may be contacted via email or telephone in between meetings to address specific questions or provide other technical assistance.

7. Preliminary Stakeholder Groups List

During the early stages of the project, Sage Places will work to identify stakeholder groups that are directly or indirectly impacted by the scope of our project. The following is a preliminary list of identified stakeholder groups:

Incorporated and Unincorporated
Clackamas County:

- Planning & Development
- Aging and Disability Services

Clackamas County Area Agency for Aging
Advisory Committee

Clackamas County Housing Authority

Clackamas Community Land Trust

Metro

AARP Oregon

Tri-Met

Oregon Department of Transportation

Older adults

8. Methodology and Approach

The project will occur in three phases (components detailed below). In Phase I, Sage Places will work with older adults and planners in Clackamas County to identify concerns around land use, housing and transportation. Using the information gathered, in Phase II we will develop a training program for older adults that will address how the identified concerns are related to planning and how older adults can advocate for their needs during planning processes. A group of 20-30 older adults will complete this training. In Phase III, Sage Places will use the feedback from the training to refine the training program. Throughout the project we will document our conversations with planners and older adults. We will synthesize what we have learned from the project to develop engagement recommendations and strategies for planners who wish to be more strategic about involving older adults in land use, housing and transportation planning processes. The final documentation will occur in Phase III.

Appendix B details the work breakdown schedule. Appendix E details the work timeline and assigned responsibilities.

8.1 Phase I: Issues Identification & Outreach

Timeline: February-March

Objectives:

1. To identify housing, land use, and transportation planning issues of importance to older adults in Clackamas County;
2. To identify older adults' understanding of planning;
3. To identify best practices in older adult engagement;
4. To identify planners' understanding of land use, housing, and transportation planning issues of importance to older adults in Clackamas County;
5. To identify what is and what is not working for planners as they attempt to engage older adults in local planning processes.

Methods:

- Focus groups and interviews with older adult community leaders and activists, as well as those who are not actively engaged;
- Examination of existing older adult needs assessments;
- Collaboration with the ongoing Clackamas County community-based assessment process;
- Literature review of planning for older adults;
- Literature review of advocacy and leadership training for older adults;

- Discussions with TAC;
- Survey, focus groups, and interviews with planners.

Participants:

Sage Places will work with HLA, AARP Oregon, Clackamas County, community-based organizations, and Sage Place's TAC to identify older adults and planners willing to participate in Phase I.

Outcome:

Data collected from Phase I will inform the development of the training program in Phase II, as well as the lessons learned document developed in Phase III.

8.2 Phase II: Advocacy and Planning Training

Timeline: April-May

Objectives:

- To develop a training program that prepares older adults to better advocate for their needs within planning processes;
- To test the training program with a representative group of older adults from Clackamas County;
- To develop an instructor's manual for future implementation of the training program with other groups.

Methods:

- Outreach efforts to connect with potential trainees include community meetings, mall food court chats, library visits, and others to be identified;
- Meetings with TAC to review and revise materials and methods;
- Training may include: community audits, interactive mapping exercises, case studies, etc.;
- Possible focus groups with older adults to test assumptions or questions prior to the training program.

Participants:

The training program will involve 20-30 older adults who have been identified through Phase I and/or through our client and TAC. Sage Place's TAC will review the training as it is under development.

Outcomes:

1. A training program designed to engage older adults in planning. The training will incorporate place based elements specific to Clackamas County, but developed

broadly enough for Housing Land Advocates and other organizations to adapt it for use elsewhere in Oregon;

2. 20-30 older adults will complete the training with a basic understanding of transportation, land use, and housing planning issues, as well as the skills to effectively advocate for their needs around these issues.

8.3 Phase III: Lessons Learned & Recommendations

Timeline: May-June

Objectives:

1. To refine and finalize the training and related materials based on evaluations and feedback;
2. To reflect on our work with older adults and planners;
3. To develop a set of recommendations for planners who wish to be more strategic about involving older adults in land use, housing and transportation planning processes.

Methods:

- Discussions with TAC;
- Outcome and process evaluation tools – survey of training participants; reflections of Sage Places based on Workplan and criteria developed with HLA and TAC.

Participants:

Feedback will be solicited from training participants. We will also work with our TAC to refine the training program and to develop recommendations for planners.

Outcomes:

1. Recommendations to assist HLA with the sustained engagement of participants following the training program;
2. A report describing the lessons-learned throughout our process, intended to inform planners of the best methods of engaging older adults in planning processes.

9. Project Roles and Responsibilities

In addition to time spent during the scheduled workshop class, Sage Places will meet twice weekly on Tuesday evenings and Friday afternoons. Sage Places will communicate regularly with Housing Land Advocates and will meet weekly on Wednesday afternoon with HLA's project manager, Robin Johnson. The team will also utilize Basecamp project management software to communicate between meetings and to develop collaborative work products.

Listed below are the primary roles of each group member. A more detailed description of assigned tasks can be found in the work schedule in Appendix E.

1. Heidi Guenin: Project Manager
2. Lindsay Walker: Designer
3. Jenny Weinstein: Community Outreach
4. Vivian Siu: Research, GIS, and Data Analysis
5. Bob Kellett: Client Liaison
6. Robin Johnson, HLA Project Manager

10. Preliminary Project Budget

Transportation reimbursement for participants	\$100
Refreshments for 3-4 public involvement events, 4 TAC meetings, & 1-2 training sessions	\$250
Outreach Training Supplies	\$300
Recruitment Ads in Newspapers	\$100
Report Printing & Plotting	\$300
Website & Technology Fee	\$150
Total	\$1,200

Appendix A: Memorandum of Understanding

MEMORANDUM OF UNDERSTANDING

Between

Sage Places

and

Housing Land Advocates

I. Purpose and Scope

The purpose of this Memorandum of Understanding (MOU) is to identify and clearly state the roles and responsibilities of each party throughout the partnership.

Specifically, the MOU is intended to:

1. Improve understanding of both the joint and diverging interests among different parties
2. Align visions of different parties through clarification of the project goals and purposes
3. Minimize roles confusion
4. Facilitate the flow of the project with pre-defined responsibilities
5. Increase efficiency and reduce costs by pooling expertise and resources
6. Establish collaborative relationships

II. Background

Sage Places is a group of five Portland State graduate students in the Master of Urban and Regional Planning (MURP) program. The team members are passionate about planning for an aging society and are eager to work on a project that will benefit a local community, but can also be adapted for other regions. The twenty-week MURP workshop project will allow this group to apply their skills and knowledge through hands-on experience in a community project.

Housing Land Advocates (HLA) is a non-profit organization focused on affordable housing issues in Oregon. Through legal representation and advocacy, technical assistance, and education on land use matters, HLA mobilizes local governments, interest groups, affordable housing providers, land use policy makers, and planners to address affordable housing issues. Currently, HLA is interested in working with students to develop a training module on planning and land use issues that targets older adults and prepares them for greater engagement in planning processes.

Both HLA and Sage Places have a shared interest in improving the engagement of older adults in various planning processes as well as a desire to help older adults to better advocate for their needs, Sage Places will work with HLA to develop a land use, housing and transportation training program. This training program will promote an understanding of planning processes, specifically those regarding land use, housing and transportation planning and the ways in which older adults are uniquely impacted. Participants will benefit by learning about planning processes and policies at the state, regional, local and neighborhood levels. The modules will stress the connection between housing and transportation, while emphasizing the long-term impacts of various planning decisions. The knowledge gained will enable participants to train their peers and empower older adults to better advocate for their needs. Additionally, based on this project experience, Sage Places will produce a planners' guide with recommendations on how to better engage the older adults in planning efforts.

III. Responsibilities

Sage Places Responsibilities

- Perform tasks as stated in the work plan (attached)
- Participate in regular meetings with HLA representatives
- Keep records of all meeting agendas and notes
- Coordinate HLA, Technical Advisory Committee (TAC), and public involvement meetings

Housing Land Advocates Responsibilities

- Participate in regular meetings with Sage Places representatives
- Provide technical advice and review/comment on draft deliverables and other work products
- Identify and solicit assistance of professionals for possible TAC involvement
- Assist with training module participant recruitments
- Provide resources requested in Section IV below
- Advocate for the use of and/or implementation of our final product

IV. Budget/ Resources Request

Sage Places is requesting support from HLA on the following resources to ensure the project is made possible. The total budget will not exceed \$1,200. Items can be met through either in-kind or cash contributions, but in any event, cash contributions will not exceed \$500.

Anticipated Needs	Budget Request	In-Kind Contributions (Value Equivalent)	Total
<u>Outreach</u>			
<i>Meeting Spaces</i>	---	free/ minimal	\$0
<i>Refreshments- 3-4 Focus Groups</i>	---	\$80	\$80
<i>Refreshments- 4 TAC Meetings</i>	---	\$80	\$80
<i>Potential Recruitment (e.g. flyers, notice on newspapers)</i>	\$100	---	\$100
<u>Training</u>			
<i>Meeting Spaces</i>	---	free/ minimal	\$0
<i>Training Supplies (e.g. trace paper, sticky sheet, easel/ wall paper pad, module materials, printing)</i>	\$150	\$150	\$300
<i>Transportation Funds for Participants (e.g. vehicle rental/ bus fare for 30-50 people)</i>	\$100	---	\$100
<i>Refreshments- 1-2 Training sessions</i>	---	\$90	\$90
<u>Deliverables</u>			
<i>Printing- Final Training Materials</i>	---	\$150	\$150
<i>Printing- Final Report/ Planner's Guide</i>	---	\$150	\$150
<u>Administrative</u>			
<i>Technology (e.g. Website/ Project management)</i>	\$150	---	\$150
Total	\$500	\$700	\$1,200

V. Copyright

Sage Places is creating the training manual for Housing Land Advocates for use in education and community outreach, a part of Housing Land Advocates' core mission. Both Sage Places and Housing Land Advocates agree that the training manual will be considered a work specifically ordered or commissioned for use as an instructional material. Housing Land Advocates will make the materials

developed by Sage Places publically available through Housing Land Advocates' website and/or through other means.

VI. Modifications

Amendment to this MOU is permissible only when the revised agreement contains dated signatures from all involved parties.

VII. Duration/ Termination

This MOU shall be effective upon the signature of Sage Places and Housing Land Advocates authorized board members. The agreement is valid until the project report is delivered and presented, or until June 11, 2010, whichever occurs first.

VIII. Signatures

Sage Places Representative

Heidi Guenin, Project Manager

Date

Housing Land Advocates Board Members

Ellen Johnson, Board President

Date

Robin Johnson, Board Member (HLA Project Mgr.)

Date

Appendix B: Work Breakdown Structure

1. Project scoping and development

- a. Project plan
 - i. Work breakdown structure
 - ii. Budget
 - iii. Schedule
- b. Memorandum of understanding
- c. Advisory group formation
- d. Identify resources for planner and older adult participant recruitment

2. Identify issues

- a. Planners
 - i. Secondary research – literature & document review
 - 1. How have other regions worked to engage older adults in planning processes?
 - 2. What barriers do planners face in engaging older adults?
 - 3. What barriers do planners face in meeting the needs of older adults through various planning processes?
 - ii. Primary research – questions determined by 2.a.i
 - 1. Survey of Oregon planners
 - a. Develop
 - b. Conduct
 - c. Analyze
 - 2. Interviews with planners in Clackamas County
 - a. Develop
 - b. Conduct
 - c. Analyze
- b. Older adults
 - iii. Secondary research – literature & document review
 - 1. What issues do older adults face in relation to housing, land use, and transportation?
 - 2. What are the barriers that prevent older adults from fully engaging in planning processes?
 - 3. What are the best practices for engaging older adults in planning processes?
 - iv. Primary research
 - 1. Interviews with key older adult leaders and activists
 - a. Develop
 - b. Conduct
 - c. Analyze
 - 2. Focus groups with older adults
 - a. Develop
 - b. Conduct
 - c. Analyze

3. Other methods determined by 2.b.i.3

3. Develop training

- a. Connect issues and planning through research & TAC consultation
 - i. How do the identified issues relate to planning?
 - ii. What planning processes and policies affect each issue?
 1. National
 2. Oregon
 3. Metro
 4. Clackamas County
 - iii. What resources already exist that explain planning practices using straightforward and easy to understand concepts?
- b. Training materials and exercises
 - i. Research
 1. How do older adults learn best?
 2. What types of technologies have been effective in older adult curriculum development?
 - ii. Draft training
 1. Consult with HLA
 2. Consult with TAC

4. Facilitate training

- a. Recruit participants
 - i. Invite engAGE in Community volunteers
 - ii. Consult with TAC
 - iii. Contact individuals from 2.b.ii who expressed interest
- b. Logistics for training
 - i. Secure space and necessary technologies
 - ii. Secure transportation or transportation reimbursements for participants
 - iii. Secure refreshments
 - iv. Provide materials binders for participants and trainers
 - v. Provide evaluations (see 5.a.ii)

5. Evaluate and reflect

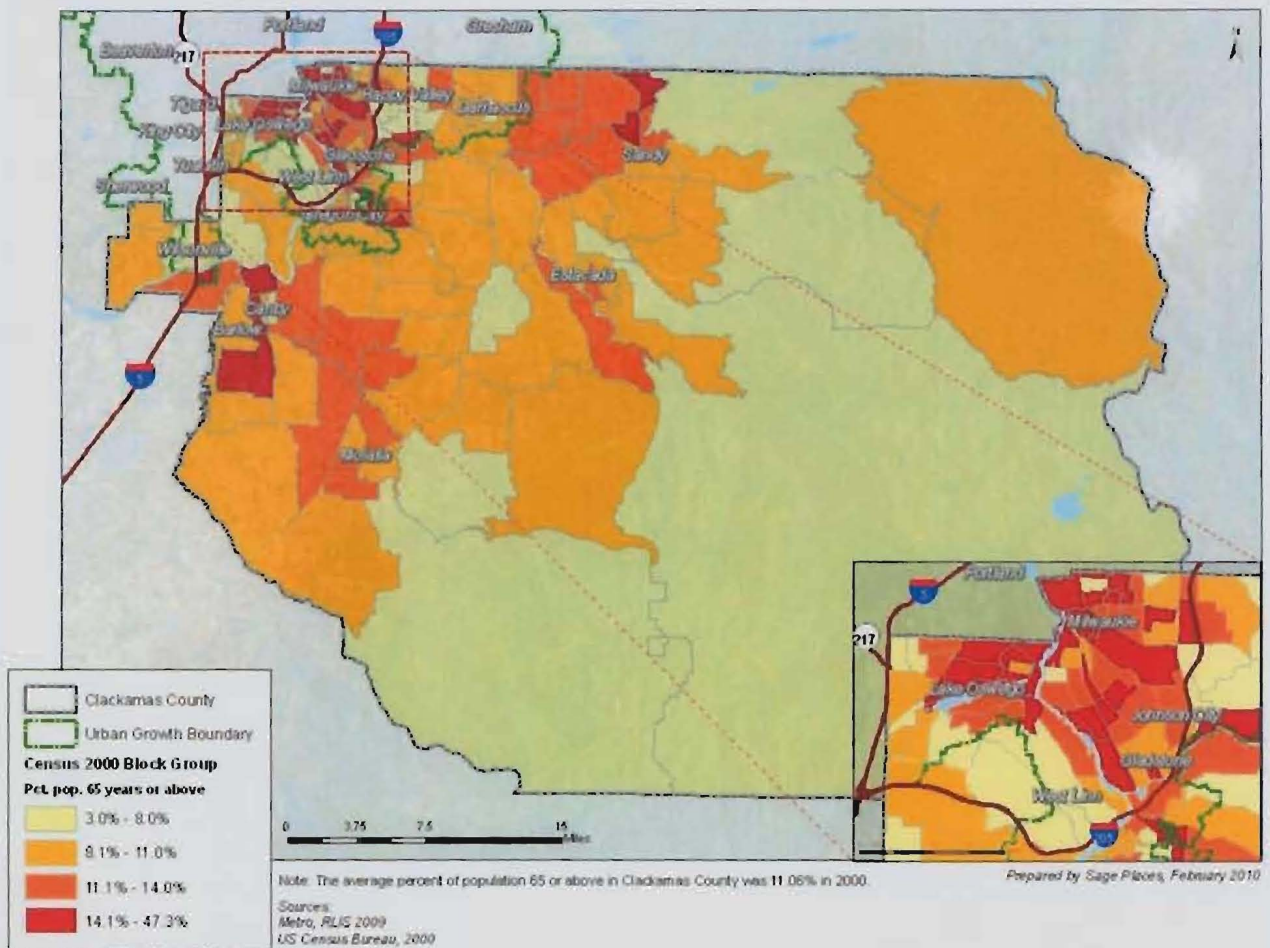
4. Develop training evaluation tools
 - i. Work with HLA to determine success criteria
 - ii. Create survey for participants to complete after the training
5. Develop lessons-learned report for HLA and planners
 - i. Synthesize information from 2.a, 2.b, and 5.a.ii to document lessons learned and recommend practices for the future.
 - ii. Consult with HLA
 - iii. Consult with TAC

6. Develop final products

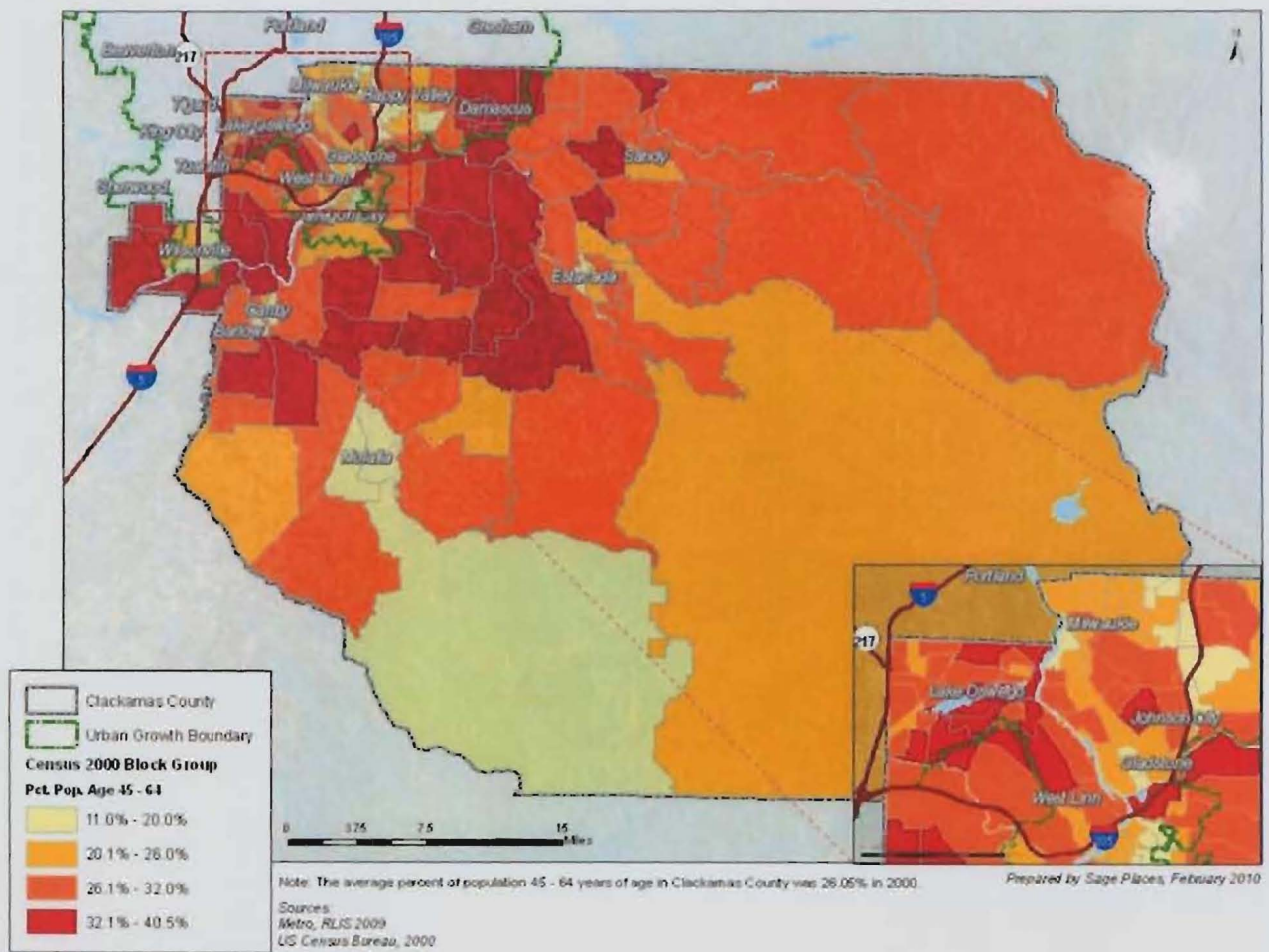
- a. Workplan assessment
 - i. Winter

- ii. Spring
- b. Final report
 - i. Draft for faculty review
 - ii. Final for MURP
- c. Presentation
 - i. Class presentation of preliminary recommendations
 - ii. Class presentation of project
 - iii. Smith presentation
- d. Training materials
 - i. Student binder
 - ii. Trainer's binder

Appendix C: Clackamas County Maps

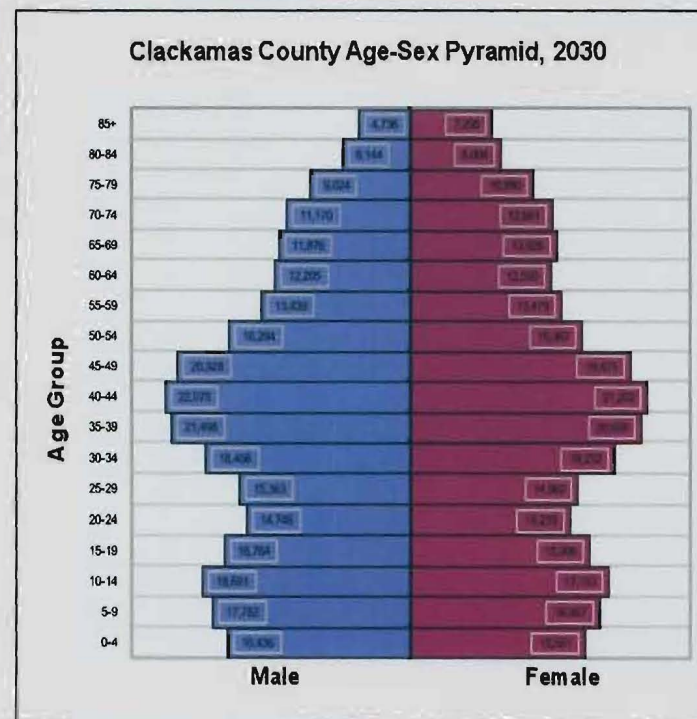
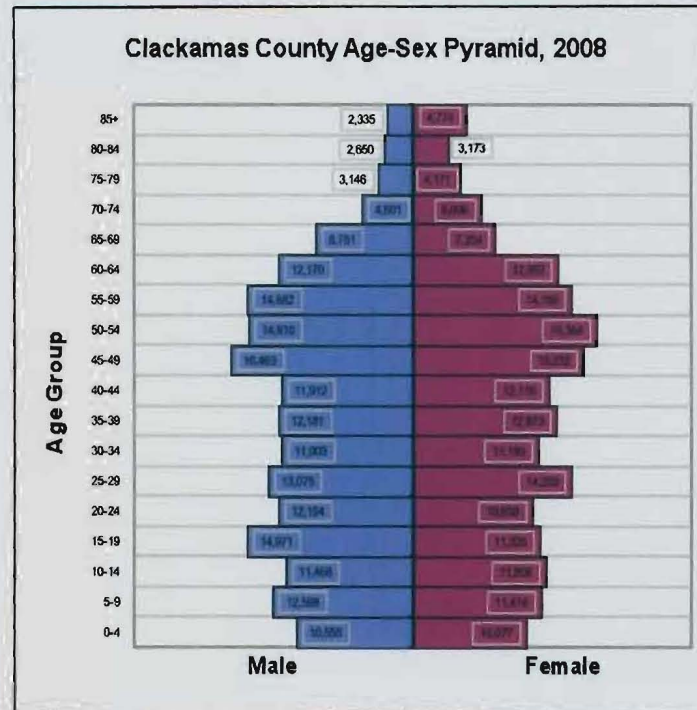


Population 65 and older (census block, 2000)



Population 45-64 years of age (census block, 2000)

Appendix D: Age Pyramids



Appendix E: Phased Workplans

The following phased workplans were developed for Sage Places' reference and are not exhaustive.

Phase I Issue Identification – Secondary Research (through April 19th)

Purpose of the Research Findings

- Provide Background Context
- Establish Baseline Information
- Inform Strategic Outreach, curriculum contents, and recommendations to planners
- Provide ideas for information gathering, potential educational and curriculum development

Secondary Research Plan Outline

1. Provide Background Context
 - a. Historical Patterns/ Cases Highlights of the problem (SP ongoing?)
 - b. Demographics (Vivian 2/17)
 - i. Share of older adults
 - ii. Age/sex changes
 - iii. Race
 - iv. Language
 - v. Education
 - vi. Employment
 - vii. Housing
2. Establish Baseline Information
 - a. Current Engagement (Primary Research) How are older adult participating in planning processes? Type of events? Frequency?
 - b. Current Practices (Primary Research) How are planners currently engaging older adults in their practices? Strategies? Special consideration?
 - c. Planning System at different levels, keep in mind about differences between rural and urban settings (Bob, Heidi 4/12)
 - i. State
 - ii. Regional (Metro)
 - iii. County
 - iv. City
 - v. Local, e.g. neighborhood associations/ CPO
3. Inform Strategic Outreach, curriculum contents, and recommendations to planners
 - a. Are current processes meeting the needs of older adults? Why and why not (Primary Research, Jenny 2/17)
 - b. Barriers for older adults civic engagement(Primary Research, Jenny 2/17)
 - i. Planning related
 - ii. Suburban/ rural
 - c. Barriers for planners to engage older adults(Primary Research, Bob 2/17)



Reshaping the Planning AGenda

- How do identified needs of older adults relate to the planning system context?
Review existing needs assessments to identify planning issues. (Bob, Heidi 4/7)
- d. Clackamas County and City Specific Issues (*Cities include: Barlow, Canby, Damascus, Estacada, Gladstone, Happy Valley, Johnson City, Lake Oswego, Milwaukie, Molalla, Oregon City, Sandy, West Linn, Wilsonville*) (Bob ongoing)
 - i. Hot button issues
 - ii. How do people/ older adults react?
 - iii. How they affect older adults
 - e. Older adults cognition, learning and education (Jenny, Lindsay, Vivian 4/19)
 - i. Aging physical changes – Lindsay
 - ii. How these affect cognition and learning - Jenny
 - iii. Tools or strategies that work well with educating older adults – Lindsay
 - iv. Example of classes targeted at older adults - Jenny
4. Provide ideas for information gathering, potential educational and curriculum development
- a. Examples of what others have done on (Vivian 2/17)
 - i. Older adults engagement
 - ii. Planning and best practice
 - b. Examples of Planning 101 topics or presentations (Lindsay 3/15)
 - i. Land use
 - ii. Housing
 - iii. Transportation
 - c. Examples of tools and technology for engagement (Everyone as you research 3/15)
These include *reference items* (such as the sample survey for planner that already posted or cool activities you come across to convey messages) for us to better design and conduct outreach/training sessions. This can be something that is not older adults specific so give us more ideas.
 - i. Surveys for Planners
 - ii. Sample interview or focus group questions
 - iii. Innovative engagement strategies
 - iv. Technology

Phase I Issue Identification – Primary Research (through March 21st)

Part A. Primary Research with Planners

Overarching Questions:

- How have other regions worked to engage older adults in planning processes?
- What barriers do planners face in engaging older adults?
- What barriers do planners face in meeting the needs of older adults through various planning processes?
- What, if any, techniques do planners utilize to engage older adults in local planning processes?

1. Survey of Oregon planners

- a. Develop survey questions (Bob & Vivian by 2/15)
- b. Set up online format (Lindsay – check-in with Bob & Vivian 2/12)
- c. Research outlets for contacting planners (Bob by 2/12)
 - i. Check with OAPA
 - ii. Emily P. may know from her experience w/ the Big Look Plan consider alternatives to OAPA? (Planning Commissioner's? – Karla may know)
- d. Consult with HLA about questions (Bob & Vivian 2/15 – 2/19)
- e. Email survey to planners (Bob 2/19 – 3/5)
- f. Conduct online survey for 2 weeks - send reminder (Bob 3/1)
- g. Analyze & synthesize findings (Bob & Vivian 3/6 – 3/10)

2. Interviews with planners in Clackamas County and with public participation professionals

- a. Develop interview questions (Bob & Vivian 3/11 – 3/15)
- b. Consult HLA about questions (Bob & Vivian 3/15 – 3/17)
- c. Generate list of 6-9 potential interviewees based on survey results (be representative of various planning agencies, regions, levels of government, etc.) (Bob 3/6 – 3/8)
- d. Contact interviewees to set up interviews (Whole team 3/8 – 3/15)
- e. Conduct interviews (via email, phone, or in-person) (Whole team 3/17 – 4/5)
- f. Analyze findings (Bob & Vivian 3/26 – 4/8)

Part B. Primary Research with Older Adults

Overarching Questions:

- What issues do older adults face in relation to housing, land use, and transportation?
- What are the barriers that prevent older adults from fully engaging in planning processes?
- What are the best practices for engaging older adults in planning processes?
- What are the most pressing planning issues for older adults?

1. Interviews with key older adult leaders and activists
 - a. Develop interview questions (Heidi by 2/15)
 - b. Contact groups to tap into resources to find interviewees (Jenny by 2/15)
 - i. Contact Elders in Action (Multnomah County Aging and Disability Services Advisory Commission)
 - ii. AARP Oregon volunteers – contact Bandana Shrestha
 - iii. Clackamas County Area Agency on Aging Advisory Council – contact Brenda Durbin
 - c. Consult HLA about questions (Bob & Heidi 2/15 – 2/19)
 - d. Conduct 5-8 interviews (via email or in-person) (Heidi, Lindsay, & Jenny 2/19 – 3/5)
 - e. Analyze findings (Heidi 3/1 – 3/5)
2. Focus group with older adults from Clackamas County
 - a. Develop questions and format (Lindsay & Jenny 3/5 – 3/10)
 - b. Create marketing materials/invites to publicize focus group & check into Town Center rules about tabling (Lindsay 2/15 – 3/1)
 - c. Consult with HLA about questions (Bob & Jenny 3/10 – 3/15)
 - d. Consult with TAC about questions (Jenny 3/10 – 3/15)
 - e. Invite 6-9 older adults – promote w/ Clackamas Town Center morning walkers; post in community paper event listings (Lindsay 3/1 – 3/10)
 - f. Conduct focus group in the Clackamas Town Center food court (get coffee and breakfast goodies at food court) (Whole team 3/15 – 3/26)
 - g. Transcribe (Lindsay 3/26 – 3/28)
 - h. Analyze findings (Lindsay & Heidi 3/28 – 4/2)
3. Focus group with low-income older adults
 - a. Develop questions and format (Lindsay & Jenny 3/5 – 3/10)
 - b. Schedule focus groups and secure space (Heidi 3/1 – 3/10)
Contact Mary Rain-O'Meara at the Clackamas County Housing Authority about conducting a focus group at a senior housing site (Hillside Manor, 2889 SE Hillside St, Milwaukie); An alternative could be another low-income senior housing development.
 - c. Create marketing materials/invites to publicize focus group (Lindsay 2/15 – 3/1)
 - d. Consult with HLA about questions (Bob & Jenny 3/10 – 3/15)
 - e. Consult with TAC about questions (Jenny 3/10 – 3/15)
 - f. Arrange refreshments (Heidi 3/5 – 3/15)
 - g. Conduct focus group (Whole team 3/15 – 3/26 – somewhere in that range to be determined soon!)
 - h. Transcribe (Heidi 3/26 – 3/28 or sooner)
 - i. Analyze findings (Heidi & Lindsay 3/28 – 4/2)

Phase II Training – Development and Facilitation (through 5/17)

1. Research and Development
 - a. Planning 101 topics or presentations (Lindsay 3/15)
 - b. How older adult issues relate to planning (Bob & Heidi 4/7)
 - i. Clackamas County & Cities (4/12)
 - ii. Metro (4/12)
 - iii. Oregon (4/12)
 - iv. National? (4/12)
 - c. Review Lindsay's findings and gather up any other resources that explain policies from 1.b.i-iv in plain terms (Bob & Heidi 4/19)
 - d. Conduct research into older adult cognition (Lindsay, Vivian, & Jenny 4/19 – see secondary research plan)
 - e. Draft training and facilitator's guides based on research (Heidi & Jenny 4/26)
 - f. Consult with HLA and TAC about training and facilitator's guide (Heidi & Jenny 5/3)
 - g. Revise and finalize training (SP 5/7)
2. Facilitate Training
 - a. Recruitment
 - i. Work with CC to invite engAGE volunteers (Jenny 5/7)
 - ii. Research deadlines for local paper ads (Lindsay 3/31)
 - iii. Develop training invitation for print media (DATE SUBJECT TO CHANGE based on 2.a.ii) (Lindsay 4/9)
 - iv. Research outlets for email invitation (Jenny 3/31)
 - v. Develop training invitation to circulate via email (DATE SUBJECT TO CHANGE based on 2.a.ii) (Lindsay 4/9)
 - vi. Consult with TAC about other options for participant recruitment (Jenny 4/26)
 - vii. Contact individuals who participated in training & send participant reminders (Jenny 5/7)
 - b. Day-of logistics
 - i. Secure space for training (Bob 5/3)
 - ii. Secure transportation funding for participants (Jenny 5/3)
 - iii. Secure refreshments for training (Heidi 5/3)
 - iv. Compile training binders and evaluation surveys for participants (Heidi & Jenny 5/11)
 - v. Conduct training (SP 5/12)
3. Evaluation and Reflection
 - a. Work with HLA to develop success criteria for training (Jenny & Heidi 4/30)
 - b. Create survey for participants to complete after training (Jenny & Heidi 5/7)
 - c. Analyze training evaluation and compile summary for class presentation (Jenny & Heidi 5/17)

Appendix F: Project Schedule (attached)

