Reshaping the Planning AGenda

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Reshaping the Planning AGEnda

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Master of Urban and Regional Planning
Nohad A. Toulan School of Urban Studies and Planning
Portland State University, Portland, Oregon

June 2010
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Reshaping the Planning AGenda

Sage Places
Heidi Guenin
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Lindsay Walker
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This report was prepared as a requirement for graduate coursework for the Master of Urban and Regional Planning program in the Nohad A. Toulan School of Urban Studies and Planning at Portland State University, in partnership with Housing Land Advocates.

Volume Two, a training binder and Volume Three, a trainer’s manual, can be found on the Housing Land Advocates website and in the enclosed CD-ROM.

Electronic copies of this report may be requested from Housing Land Advocates at info@housinglandadvocates.org

June 2010

Acknowledgements
The authors would like to express their gratitude to all of the individuals who shared their knowledge and time throughout this project, particularly the many older adult and planner interviewees and training participants.

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Bandana Strestha, AARP Oregon

Workshop Advisors
Dr. Ellen Bassett and Dr. Sumner Sharpe
Foreword

The aging boom is upon us. With the first Baby Boomers turning 65 years old this year, we are on the cusp of a dramatic shift in how our society will look. The changing demographics present both challenges and opportunities to communities in Clackamas County and throughout Oregon.

One of the greatest challenges we face is providing opportunities for people to age in place. Unfortunately, far too many of our communities lack the affordable housing options and necessary services that allow older adults to age in a manner in which they can be active, healthy, and maintain their social and supportive networks. This challenge is difficult now, but it is only going to increase over time if we do not use all of our resources, including comprehensive and strategic planning, to develop more and better housing, land use, and transportation options.

The aging of society also provides us with many opportunities. With age comes wisdom and experience. The knowledge of older adults should be fully utilized so that their children and grandchildren can live in vibrant communities that are good for people of all ages. Engaging seniors in planning will benefit all of us. Tapping into this rich, diverse pool of experience can help us to identify how our communities need to evolve, and will allow us to learn from past mistakes and successes.

Engaging seniors may help us discover new possibilities that we may not even be able to envision right now.

This report, and the accompanying training manual, offer practical ways for all of us to better involve older adults in planning decisions that impact how our counties, cities, and towns will look and function in the years to come. It shows that we have both fundamental and systemic challenges to overcome if we are to engage older adults in planning, but there are steps we can take to fully realize the benefits of our collective wisdom.

I am excited to build upon the work of Sage Places and work with AARP Oregon to seek new ways to involve older adults in efforts to improve their communities.

Ellen Johnson
Board President, Housing Land Advocates
About Us

Housing Land Advocates

Housing Land Advocates occupies the critical space where land use planning meets affordable housing provision and policy. The organization serves as an educator and convener, bringing together policy makers, planners, affordable housing practitioners, and other community members to discuss how land use planning can support affordable housing goals. It serves as an advocate for thoughtful land use planning that aligns with housing policy, and as a watchdog to ensure that the state and local governments fulfill their obligations under adopted affordable housing policies and statutes. Unlike other organizations that play a statewide housing or land use advocacy role, Housing Land Advocates focuses on affordable housing and land use issues, and is prepared to engage in litigation if that becomes necessary in order to compel compliance with local, state, and federal law.

The Housing Land Advocates board of directors includes land use planners, attorneys, lenders, researchers, and housing advocates and practitioners with a demonstrated commitment to affordable housing. HLA, a fully-volunteer organization, was formed in 2004, and is a 501(c)(3) charitable corporation.

Website: http://www.housinglandadvocates.org/
Email: info@housinglandadvocates.org
**Sage Places**
Sage Places is made up of five graduate students from Portland State University’s Master of Urban and Regional Planning (MURP) program. During the Winter and Spring quarters (January-June), second-year Master’s students take part in the required Planning Practice Workshop. Students work in small groups to develop a project for a community client of their choice. Past projects have been important and of lasting value to the communities for which the work was done. Sage Places’ project addresses planning in an aging society, drawing on team members’ backgrounds in transportation planning, public health, social work, and community organizing.

**Heidi Guenin** has been advocating for health equity in Portland for the last two years. This project marks her completion of the MURP program with a specialization in land use. She is also pursuing a graduate certificate in GIS and a Master’s of Public Health degree from Oregon Health & Science University. Guenin has a B.A. from the University of Virginia in English Language and Literature and in Economics.

**Bob Kellett** has lived in Portland for a decade and is completing his degree in transportation planning. He has worked as an intern on the active transportation project at Metro, as a graduate research assistant position with the Population Research Center, and as a research assistant for various transportation planning projects. Prior to entering the MURP program, Kellett was a grantwriter and fundraiser for nonprofit organizations.

**Vivian Siu** has lived in Portland for seven years and is completing her MURP degree specializing in environmental planning. She is also working on her Master of Public Health degree at Oregon Health & Science University, expected to graduate in Fall 2010. She works as a research assistant at the Population Research Center at Portland State University. She has worked as an intern on a collaborative project between Metro and Kaiser Permanente establishing built environment measures and studying its associations with walking and health among older women.

**Lindsay Walker** moved to Portland two years ago to complete her MURP degree specializing in transportation planning. She currently works as a graduate research assistant with the Intelligent Transportation Systems Lab at Portland State University and has worked as an intern for the local bicycle and pedestrian planning consultant, Alta Planning + Design. Prior to entering the MURP program, Walker was employed as a transportation planner and non-motorized coordinator for the California Department of Transportation.

**Jenny Weinstein** moved to Portland two years ago to complete her MURP degree specializing in land use, as well as a graduate certificate in real estate development at Portland State University. Weinstein also holds a B.A. in Sociology from the University of Arizona as well as a Master’s of Social Work with a dual emphasis on social administration and community organizing from the University of Pittsburgh.
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Executive Summary

Reshaping the Planning AGEnda examines the participation of older adults in planning in Clackamas County. The report was developed by Sage Places, a team of Master of Urban and Regional Planning students at Portland State University, on behalf of Housing Land Advocates (HLA) and AARP Oregon. From January until June 2010, Sage Places looked at the role that older adults (loosely defined as adults 65 years and older) are playing in planning and methods for how their participation could be strengthened.

Objectives
With the Portland metropolitan region expected to experience an aging boom and an increased need to understand how and why older adults participate in planning, this project had four primary objectives.

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.
3. Develop a training program that will improve older adult understanding of land use, transportation and housing issues.
4. Provide planners with recommendations about how they can better involve older adults in planning processes.

Methodology
The findings and recommendations in this report result from a mix of primary and secondary research. We conducted interviews and focus groups with older adults in Clackamas County. We conducted a survey of planners throughout Oregon and interviewed planners working in Clackamas County. Additionally, we developed a training program designed to improve older adult understanding of planning.

Key Findings
Our research and discussions with older adults and planners revealed that the obstacles to effective older adult participation in planning fall into two broad categories: fundamental challenges and process failures.

The fundamental challenges include:
- Diversity of aging population: Planning for a population with ever shifting needs and a wide range of preferences is difficult.
- Reactionary involvement: It is difficult to engage older adults in long-range planning. Their involvement is often in reaction to a specific proposal.
- Aging in place: Most older adults want to remain in place as long as possible but have a perception that their communities do not have adequate housing options to facilitate this.
- Civics: Many older adults misunderstand the role of planning and generally distrust government.
The process challenges include:
- Storytelling: Older adults place high value on having their stories heard. Planning processes often do not enable this type of participation.
- Misunderstanding of aging: Planners often view aging issues as something to be addressed by social services agencies rather than through planning.
- Overrepresentation: Older adults are sometimes viewed by planners as being overrepresented in planning processes. This view limits outreach to older adults who have been traditionally left out of planning.
- Outreach: Planners face a difficult challenge of trying to balance the use of new technology with a population that has varied technological skills.

Recommendations
Based on what we heard and learned, we developed the following recommendations for HLA and for planners.

For Housing Land Advocates
- Consider a mixed approach: A training program may reach some older adults, but it should be part of a larger education strategy.
- Focus the training: When using a training program for older adults, the more specific and personalized you can make it for the participants, the more effective a tool it will be.
- Share the possibilities: Develop tools and avenues for older adults and planners to learn about the spectrum of housing options that currently exist, particularly those that facilitate aging in place.
- Provide intergenerational opportunities: Create chances for older adults to interact with young adults to learn about and work on planning issues.

For Planners
- Use existing resources: Use the existing guides and information about planning for an aging population.
- Leave time for storytelling and networking: Provide avenues in the planning process that allow older adults to share their experiences and knowledge.
- Engage older adults in proactive, rather than reactive planning: Be proactive in your efforts to engage older adults early in the planning process and to involve them in long-range planning.
- Consider non-traditional outreach strategies: Meet older adults where they congregate, and tap into the rich informal social networks that already exist.
- Collaborate with social services providers: Take advantage of opportunities for joint gain in coordinating with agencies that provide direct services to older adults.
- Use existing networks and advocacy groups: Invite local advocacy groups to play key roles in the planning process.
- Limit the use of “planner-speak”: Minimize the use of planner jargon and new buzzwords that may be unfamiliar to others.
The Problem
The Problem

Problem Statement

It has been called “The Aging Tsunami,” “The Age Wave,” and “The Graying of America.” A demographic shift is occurring in the United States and in the Portland metropolitan region. We are living longer, and we are getting older. With the first of the Baby Boomers reaching retirement age this year, the aging of America will be more prominent than ever before.

This shift should not catch planners by surprise. The demographic data indicate that 1 in 5 people in the United States will be over 65 years old by 2030. Much thought and attention has been paid to how an older society will impact the way we all live. There has been substantial literature written about planning and physical environments that support an aging population, and communities across the country are implementing age-friendly initiatives.

While much has been written about developing built environments that support older populations, there are far fewer examples of best practices to engage older adults in planning. Older adult issues rarely become a priority in local planning efforts, and few planning organizations are critically examining how they work with older adults. For these reasons, this project began with a focus on older adults themselves, recognizing that the current level of older adult participation in planning does not lead to outcomes that address older adult needs. Housing Land Advocates (HLA) felt that, in order for planning to more effectively address older adult issues, older adults themselves would need better tools to advocate for their interests. To test this assumption, this project aims to answer two main questions.

1. To what extent do older adults in Clackamas County participate in planning?
2. What are the challenges to getting more effective older adult participation in planning?

Definition of older adults

The term “older adult” has many different meanings. During research for this project, we defined older adults as those who are 65 years and older. While the initial focus of the project was on the identified needs of people over the age of 65, we strove to include the visions and needs of those approaching this age and those who self-identified as older adults. There is great variety of opinions, skills, and backgrounds within any age cohort; as in most communities across Oregon, residents of Clackamas County face varied challenges and issues.

Project Purpose & Goals

In an effort to find avenues that would lead to better planning outcomes for older adults, four project objectives were developed.

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

Project Area & Demographics
Clackamas County is located just southeast of Portland, Oregon. Clackamas County is the largest county in the Portland metro area, encompassing 1,879 miles and 14 incorporated cities. According to the County’s 2006 consolidated plan, about an eighth of the land area in Clackamas County is considered urban; the majority is rural. As shown in Figure 1, the urbanized area is clustered in the northwest corner of the county, while the majority of the area outside of the urban growth boundary is devoted to agricultural use or forested land. With a mix of urban, suburban, and rural areas, the diverse landscape creates challenges for urban and regional planning and coordination between jurisdictions. According to the 2000 Census, with 20 percent rural housing units, Clackamas County has the largest share of rural housing of all the Metro counties, but this pattern is similar to the pattern observed for Oregon, as well as the nation overall. (See Table 1.)

As illustrated in Figure 2, Clackamas County has been experiencing steady population growth with an annual average growth rate of about 1.5 percent since 2000. The racial composition of the county was fairly homogeneous, with 94 percent of the population over the age of 40 identified as White in the 2000 Census. Clackamas County is consistent with national demographic trends in that it will experience unprecedented population growth among older adults over the next few decades.
The Problem

The age pyramids in Figure 3 show that there will be an increase in population in all age groups. A dramatic widening at the top can be observed in the next few decades as the Baby Boomers age and account for the growth of the older population. 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 that number is expected to grow beyond 178,000 within the next twenty years. This demographic shift represents new challenges for planners as they seek out best practices for engaging older adults in local planning processes and new approaches to meeting the needs of an older population.

Clackamas County is similar to counties in the rest of Oregon, as well as around the country, in that the prevalence of older adults in suburban and rural areas is on the rise. The clusters of older adults shown in Figure 4 are located primarily in the urban and suburban areas. However, the pattern is shifting. Figure 5 shows the percent population who were 45-64 years old in 2000; this includes older Baby Boomers and younger members of the cohort born before the Baby Boomers, assuming no substantial demographic changes. The idea of aging in place – the ability to live in one’s own home, wherever that might be, for as long as comfortably possible – has become more prominent, and conversations about planning for aging will need to address issues in these suburban and rural areas where there are large numbers of older adults but few housing and transportation options.

Table 1 – Urban-rural distribution in Clackamas County

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<th>Number of Housing Units</th>
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<td>Oregon</td>
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<td>Clackamas Co.</td>
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<td>Washington Co.</td>
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<td>93.7%</td>
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Data Compiled by Sage Places

Did you know...

- The area of Clackamas County is larger than the state of Rhode Island.
- The unincorporated portion of Clackamas County that lies within the urban growth boundary would be the largest city in Oregon if incorporated.

The sheer size of the county speaks to the challenges of planning for this community.

Figure 2 – Population trend for Clackamas County, 2000–2009

Figure 3 – Age-sex population pyramids for Clackamas County

2008

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2030

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Sources: 2008 ACS, US Census Bureau; 2030 Oregon Office of Economic Analysis
The Problem

Figure 4 – Percent of population 65 or older in 2000 Census block group, Clackamas County
Figure 5 – Percent of population 45-64 years in 2000 Census block group, Clackamas County.
The Approach
The Approach

Process and Methods

One goal of this project was to learn more about how planning is and is not addressing the needs of older adults. We wanted to gain the perspectives of a wide range of individuals and organizations including:

- older adults actively engaged in planning processes;
- older adults who had limited or no experiences with planning;
- planners who have worked with older adults and on issues related to aging; and
- community organizations that have worked with older adults, including social services providers, businesses, and advocacy groups.

In order to gather this information, we undertook the following steps summarized in Figure 6. While the steps are presented in a linear fashion in this report, they sometimes occurred concurrently during the project.

Background Research

Prior to talking with planners and older adults, we set out to gain an understanding of the issues related to older adults and planning as identified by scholars, practitioners, and advocates. This began with an extensive literature review (see Secondary Research and Bibliography) that attempted to answer several broad questions.

- How do community planning processes meet or fail to meet the needs of older adults?
- What barriers do older adults face in civic engagement?
- What barriers do planners face when attempting to engage older adults in planning?
- How does the planning system impact the needs of older adults?
- What are examples of best practices in planning for older adults and engaging older adults in planning?
- What teaching methods and learning environments are ideal for older adult students?
The Approach

How should training materials be designed for older adults?
How do older adults see themselves fitting into planning processes?

Using the information collected in the literature review, we developed a series of questions and themes to explore with older adults and planners. With this set of questions, we intended to learn from their first-hand experiences, hoping to fill in the knowledge gaps and that had emerged from our research.

Interviews with Active Older Adults
During our initial literature review we found that, in general, older adults enjoy telling personal stories. We also found that many of the best practices in planning for older adults were driven by older adults themselves. Based on this information, we set out to identify and talk with older adult leaders and activists in Clackamas County. We worked closely with our client, technical advisory committee, and community partners to identify older adults who have been engaged in planning and civic activities in their communities.

Between February and March we conducted one-on-one interviews with nine older adults. The interviewees ranged in age from their mid-50s to mid-80s. They included an elected city councilman, a realtor who works with older adults, neighborhood activists, and a newspaper columnist who writes about older adult issues. The interviews were roughly 45 minutes in length, though several lasted 60 to 90 minutes. The interviews generally followed a scripted format with flexibility built in to provide interviewees with the opportunity to tell stories. (See Appendix A for interview questions.) Through these conversations, we sought to learn about:

- how they first became involved in planning;
- their perceptions of how planning is or is not meeting the needs of older adults;
- the information and resources that they have found useful during their engagement in planning;
- the challenges they have faced during their involvement in planning processes; and
- their general level of involvement and their preferred ways of being involved.

Small Group Interviews & Focus Group with Older Adults
We recognized early that Clackamas County is both geographically large and culturally diverse. It was our assumption that some of the needs of older adults in urban areas would be different than the needs of older adults in suburban and rural communities. Therefore,
we were interested in exploring how this might impact efforts to engage and plan for older adults. We were particularly interested in talking with people who had little or no previous involvement with planning processes. We wanted to learn why they were not involved, their perceptions of planning, and the issues that were important to them as they age.

Based on these objectives, we made a concerted effort to gather the views and opinions of older adults throughout Clackamas County. It was important to us that we talk with people of different socioeconomic and educational backgrounds, and others who are often marginalized and left out of planning processes. In some instances our meetings and interactions with older adults were spontaneous or unplanned, at least on the part of the interviewees. Our unique outreach efforts reflect our attempt to learn from a diverse range of older adults coming from various parts of the County.

We accomplished this by conducting one focus group (Figure 7) and four small group interviews (Figure 8) involving a total of 32 older adults. In total, the group interviews included 13 men and 19 women, ranging from younger Baby Boomers in their 40s to those in their 90s. The interviews generally followed a format detailed in Appendix B.

The information gathered through our conversations and discussions with older adults helped to shape both our training and our recommendations.

Survey of Planners
To learn from the perspective of planners, we created an online survey which we invited planners throughout Oregon to take. The survey, detailed in Appendix C, was accessible online for a 20 day period in February and March.

Focus group and interviews were held at several locations.

Lake Oswego: We held a focus group at a church with eight older adults who had been involved with an effort to build an affordable housing project in their community.

Clackamas Town Center: We talked with eight older adults who walk at the mall for exercise and then gather in the food court for coffee and socializing.

Molalla: We met with six older adults who meet regularly at the bowling alley for morning coffee and breakfast.

Estacada: We interviewed six older adults who currently live in a rural, subsidized housing development for individuals over age 62.

Sandy: We talked with four self-described Baby Boomers in a local coffee shop.
In their own words

“Until you do, I don’t think you worry about it. You try not to think about that ‘til you get to that stage.” – Older adult interviewee on planning for his own aging

“I still do it the old way, I like to talk to the person.” – Older adult interviewee on new technology and forms of communication

“Planners are in a cocoon. They don’t see the impact of their decisions. They’re a cog.” – Older adult interviewee on talking to planners

“My limiting factor is mowing the lawn. When I can’t do this anymore, that’s when it’s time to move.” – Older adult interviewee on planning for his own aging

“My parents went through it. You gain a perspective from personal experience.” – Planner on how she learns about older adult issues

“They have time to show up at public meetings.” – Planner on what makes older adults effective

“Too narrowly focused on personal needs or financial concerns - not enough on the future” – Planner on what makes older adults ineffective

March. A link to the survey was distributed electronically via the Oregon chapter of the American Planning Association, the Portland State University Master of Urban and Regional Planning alumni listserv, and as well as through our personal networks of planners and colleagues. We received completed surveys from 73 planners representing a broad range of professional planning experiences.

The survey questions addressed the following topics:

- planners’ perceptions of older adult involvement in planning;
- the extent and types of outreach planners use to engage older adults;
- how effective planners think their efforts have been at addressing the needs of older adults; and
- planners’ knowledge of issues impacting older adults.

Interviews with Planners

Based on the results of this survey, we created a series of questions to further explore how planners in Clackamas County work with older adults. (See Appendix D for planner interview questions.) In early April, we conducted one-on-one interviews with 13 planners currently working in Clackamas County.

Interviewees included senior and junior level planners at the County and local municipality levels, as well as planning consultants who have worked in Clackamas County. Interviewees were selected based on their participation in our survey and their indication that they were available for a follow-up interview. Additionally, several planners identified by our technical advisory committee were also interviewed. The information and lessons learned from local planners provided useful insight toward the development of our training and the recommendations presented in this report.
The Approach

Figure 9 – Interview and survey distribution in Clackamas County

Outreach Respondents
Outreach Type [# Participants]
- Older Adult Interviews (9)
- Older Adult Group Interviews/ Focus Groups (32)
- Planner Interviews (13)
- Planner Surveys (at least 7/3 work in Clack Co.)

Urban Growth Boundary
Clackamas County

Sources:
- Metro, GIS 2009
- Personal Contacts
Prepared by Sage Places, April 2010
Conduct a Training Based on Our Findings
Using the information gathered throughout the project, Sage Places designed a training for older adults. This training was identified at the beginning of the project by HLA as a way of engaging older adults in planning and preparing them to better advocate for their needs within land use, housing, and transportation planning processes. HLA expressed interest in having us create a training that could be both specific to Clackamas County and modifiable, so that it could be used in locations throughout Oregon in the future. We designed the training for those who had limited to no previous experience in planning.

The broader objectives of the training were to increase participants’ understanding of:

1. how planning works;
2. how planning impacts them; and
3. how they can impact planning.

Figures 10 and 11 highlight the key components of the training.
Using a variety of methods, including newspaper...
The Approach

Figure 11 – The training included a presentation on older adult planning efforts in other communities (top). Participants also received a training binder (bottom).

advertisements, personal invitations, and electronic listserv announcements, we recruited participants from throughout Clackamas County. See Appendix E for a full listing of participant recruitment methods utilized by Sage Places. On May 10, 16 people participated in the training at Clackamas Community College in Oregon City. The participants ranged in age from 45-74 years old, with an average participant age of 62 years. The majority of participants identified themselves as concerned citizens, and most had some previous involvement in local planning.

The four hour training included:
• an introduction to the Oregon planning system;
• three scenarios where participants worked together in small groups on issues related to housing, land use, and transportation; and
• a lunchtime presentation highlighting examples of other older adult planning efforts that have taken place in communities across the United States.

Additionally, we created a take home training binder that provided participants with information about the Oregon planning system, contact information for planners and planning agencies, and resources about how they can most effectively participate in planning. (See Volume Two for the training binder.)

When the training ended, participants completed written evaluations. This feedback was used to refine the training materials and format in order to improve it for HLA’s future use. Appendix E contains additional information about the development of the training.
How did participants feel about the training?

“It’s a topic I’ve been watching and reading about and now that some of the unknown has been taken out of the process, I would be willing to attend a planning meeting or contact my city planner with questions.”

“Thank you ‘future planners’ – great job!”

“Good energy, good focus to training.”

“I think this would be informative to other advocacy group members.”

“Great to have younger people engaging issues of older adults.”

“Maybe use a few examples from rural areas.”
Lessons Learned
Lessons Learned

During our research and our discussions with older adults and planners, we came to recognize that the obstacles to effective older adult participation in planning can be grouped into two broad categories: “fundamental challenges” and “process failures.”

Fundamental Challenges
This category includes challenges resulting from human nature and difficulties inherent in planning for a shifting population, among others. These challenges create barriers to (and sometimes missed opportunities for) older adult participation in planning. Although planners and advocates may work to overcome them, these challenges are likely to continue to exist to some extent.

Diversity in the older adult cohorts
As both life expectancy and the sheer number of people living into their late 80s, 90s, and even 100s increases, there is a growing spread of individuals who may be defined as “older adults.” We heard from older adults that there are generational differences between Baby Boomers and their parents, for example. But we also heard that there are great differences within the cohorts themselves. Younger Baby Boomers (sometimes referred to as the “Sandwich Generation”), serving as a bridge between their retired parents and kids who may still be in school, have different interests, energy levels, and concerns than older Baby Boomers who may be retired and whose kids may have already left the house. Older adults living in nursing homes and in assisted living facilities have a much different view of their place in their communities than others who may be retired but still able to live independently in a single family home. Some older adults we spoke with continue to work well past the traditional retirement age.

The physical and mental ability continuum is not always linear or straightforward, and a person’s age does not always reflect where they are on that continuum. A healthy 70-year-old today may be a person in need of caregiving or skilled nursing tomorrow. This is a challenge for planning; developing plans that recognize the varied housing, transportation, and land use demands of an ever-shifting population is difficult.

Current and reactive planning vs. long-term visions and planning
It is difficult for older adults to consider a future where they may have increased needs due to some sort of impairment (mobility, vision, cognitive, etc.). This difficulty is due in part to the fact that an individual cannot predict exactly how his or her needs will change. It is also due in part to the fact that many older adults, including a number of those we spoke with, found this topic unpleasant and stressful to think about. Although many older adults recognize that their needs might change, most have not considered the implications of these changes in relation to their housing or transportation needs.

This poses a serious challenge to the engagement of older adults in long-term planning processes. It is also challenging to get people involved in visioning...
processes for the future when they see their future in present, able-bodied terms, rather than a future that might include different needs. Challenging older adults to think about a future that is different than the present is a difficult task for planners. We heard many say that older adults are hesitant to embrace changes in their communities and that they, in fact, are often eager to prevent changes from happening.

Additionally, many older adults expressed that they are not likely to live to see the changes that could come as a result of long-term planning processes. For example, some who participated in a recent affordable senior housing development dispute believed that she might not live long enough to see the housing built. Although planners indicated that older adults, like most individuals, get involved in planning primarily in reaction to a case that will affect their home or neighborhood, our research indicates that adults on the oldest end of the spectrum may not feel motivated even in such a circumstance.

Aging in place
Most older adults desire to age in place. They might find fault with the services available in their communities, and they might have complaints about where they live, but they are willing to put up with inadequacies in order to remain in a familiar location. As they age, it becomes increasingly important for them to maintain the social connections that they have developed. This is especially true in small towns and rural locales where people take comfort in knowing that their neighbors will support them when they most need it.

We heard older adults express how difficult it can be to age in place. Some recognize that they are living in housing situations that will be increasingly difficult to maintain as they grow older. Some expressed an interest in downsizing or moving to a more central location, but more often than not, they were unable to find affordable housing in their community that would accommodate their needs. Others considered modifications to their current home but had concerns that the cost would be prohibitively expensive. There is a general

### Housing and transportation

In our interviews with older adults, access to affordable housing and convenient transportation quickly rose to the top as key issues older adults face.

As we age, we often require a home that can adjust to changing physical abilities. There is a wide range of housing that accommodates or can be adapted for older adults with physical limitations. Unfortunately, much of this housing is either unaffordable or unavailable in Oregon communities. As a result, older adults may have to leave their communities to find housing they can afford.

Although many people we spoke with continue to drive, several others have stopped driving due to physical or financial limitations. Many spoke of a friend or neighbor who struggles to get where they need to go to meet their daily needs. Often, those without a vehicle or access to reliable and frequent public transportation are forced to rely on family members and friends for transportation, diminishing their sense of independence and sometimes leaving them feeling like they are a burden to their drivers.
perception among older adults and planners that many communities do not have an adequate diversity of housing stock to accommodate various phases of life. There is also some indication that older adults and planners are not fully aware of the housing possibilities that do exist. Many older adults believe that their only option is to stay in their current home as long as possible until they reach a point where they need full-time caregiving. Because of the stigma many older adults associate with assisted living facilities (and their determination to avoid thinking about a future in which they may someday need such accommodations), older adults may not have learned about other options with varying levels of independence and accessibility in their communities. This in turn means that older adults may be missing opportunities to support the development of such options in their communities.

**Misunderstanding about planning and distrust of government**

Many groups are characterized by distrust of government and lack of understanding about the planning process and what planners, including the older adults we talked to. In our discussions with older adults, planning was associated with government and politics, and many individuals have little faith that government projects will deliver desired results. Planners appear to understand that this is the context in which older adults consider planning. Planners relayed stories of older adults showing up to public meetings and taking on a “watchdog” role to keep planners and government workers from “sneaking” something past the community.

As is also often the case in the general population, the negative perceptions that some older adults have of planning are often a result of personal experience. If they have been treated poorly by a planner or if they view the planner as being inadequately informed about the laws and requirements, they become jaded about planning in general. If they have been through a planning process that did not lead to favorable outcomes, they become uninterested in further participation. If they do not see the products of their labor, they are inclined to blame it on government shortcomings. Most older adults do not appear to have a clear understanding of how long planning processes and implementation take, which causes further frustration and an even worse perception of planning outcomes.

The roles and responsibilities of various government agencies that are involved in planning are not clear to most older adults. Knowing who to turn to when...
Lessons Learned

a planning issue arises is challenging, and knowing which agency is responsible is difficult to navigate. Very few older adults, even those who have been engaged in planning, can articulate how planning fits into the broader government and civic life structure. Voting in elections is often viewed as the only vehicle (or the most effective vehicle) for creating change in a community.

Health care
There will always be factors outside of planners’ control that influence participation, and a key one for older adults is health care. The cost of care was a persistent topic of concern during our research. While most older adults did not make the connection between planning and the affordability of care (through transportation and housing options) or preventive care (through the creation of health-promoting environments), they did suggest that health care issues have a large influence on their participation generally, from civics to personal social engagements.

Process Failures
The second category is challenges to older adult participation in planning is “process failures.” These include barriers that are created by methods currently used in the planning process, including the outreach and participation methods relied upon by planners as well as planners’ perceptions about older adult participation. These barriers may be minimized or eliminated. Improvements in the planning process may in turn begin to address some of the fundamental challenges that create obstacles for effective older adult participation. Our recommendations in the following section will focus primarily on addressing this category of challenges.

Storytelling
The planning process does not often respect the value of storytelling. From our initial secondary research about older adults and through our conversations in Clackamas County, we learned that, in general, older adults are storytellers. They have a rich history of experience, and they enjoy sharing these experiences with others. Many need to have their voices heard, whether it is in conversations with friends over a breakfast table at a local bowling alley or it is with planners seeking their input on decisions that are important to their communities. For those who are homebound or who face other barriers to social interaction, this need may be difficult to meet.

At the same time, we heard from planners that they value learning from older adult experiences. Planners view interviews as an effective way to learn from older adults. Individuals who have lived in a community for a long time possess institutional knowledge, key connections to others in the community, and a deep understanding of neighborhood-level geography. They have an understanding of place that comes with being part of its evolution for decades.

In planning processes, both planners and community members are constrained by time and resources. Public meetings allow for citizen comments and participation, but they are not often designed to allow participants to share their stories. Older adults, in general, feel more comfortable talking in small groups, especially when they are among peers. All too often, planning does not provide an environment that allows these conversations to take place.
Lessons Learned

Storytelling

“There really aren’t many options for people without a vehicle in our area. If we didn’t have Mountain Express, people just couldn’t get off the mountain. The thing is, we have many people who have lived up here for a long time and we’ve got even more Boomers on the way. People are staying in place because they have memories up here and this is their home. But now people can’t age successfully here because there’s not enough access to anything. That’s just criminal.” – Baby Boomer living in the Sandy area

“I try not to think about getting older, I’m barely in my seventies. I know my wife and I won’t be able to live in our house forever. It’s two stories and our bedroom is on the second story. And we’ve got a huge yard. For now it’s easier just not to think about it. When we get to that point we’ll make a decision, or we’ll let our kids make it.” – Older adult living in Molalla

“I had lived in Lake Oswego for years. Used to own a house there, but I couldn’t keep up with it financially or physically, so I decided to downsize and move to Tigard. I stayed in that place for a few years, but it got to be too expensive and I’m on a fixed income. So now I live alone in an apartment in Tualatin. I still come to Lake Oswego for church and other activities because this is where my friends are, I just can’t afford to live here anymore.” – Older adult living in Tualatin (former Lake Oswego resident)

“I recently gave up my car and now I can see how important, and sometimes challenging, public transit can be. I’m new to buses, but I can tell you that it wasn’t easy to get here. Sometimes it feels like this city thinks everyone is wealthy, healthy, and young, so bus service isn’t a priority.” – Older adult in Lake Oswego

Insufficient understanding of older adult needs

We heard from planners that they are aware of the aging demographics in the region, and they believe that this requires an understanding of the issues that impact older adults. We also heard that by better understanding the aging population, planners believe they could better engage older adults in planning activities. Planners are largely aware of existing resources regarding planning for an aging population, but these resources are not widely used. The day-to-day time constraints of their jobs make it difficult for some planners to acquire additional education about planning for older populations. Many planners we talked with said they learn about the issues facing older adults through their experiences with their own parents and grandparents. This narrow perception may limit planners’ understanding of the various options that exist for aging populations in terms of transportation, housing, and land use.

Additionally, many planners believe that older adult needs should be addressed primarily by social services agencies. Social services agencies provide significant assistance to older adults, especially to those with physical limitations, low incomes, or those on the older end of the age continuum. For many planners, the needs addressed through these service provisions (assistance with transportation, housing, health care, food security, etc.) are associated solely with social services agencies and are not often considered in terms of planning. There is not widespread understanding of how planning for older adults can relieve the strain on social services nor does there appear to be much collaboration between planning and social services organizations.
Lessons Learned

Older adults are considered an overrepresented group
We heard from planners that older adults do show up for public meetings and that they do participate in planning. We also heard that the older adults who are involved in planning are involved to represent themselves, not to represent the interests of an aging population as a whole. There does not appear to be a well organized effort to advocate for the general needs of older adults or to influence planning.

The visible presence of older adults in planning processes and the perception that older adults are overrepresented may limit planners’ efforts at outreach and engagement. Because older adults are viewed as being the “ones who show up,” planners often do not make a targeted effort to engage them. As a result, only a small portion of the older adult population is taken into consideration in the planning process. As with other segments of the populace, older adults that are lower-income, less educated, minorities, non-English speakers, people with physical and cognitive/mental health issues, the transportation disadvantaged, and renters are less represented.

Outreach
There is great diversity in how various segments of the older adult population prefer to communicate. We heard from some Baby Boomers and those on the older end of the age continuum that they dislike new technology and social media. They would rather make contact over the telephone and in person. Others are more technologically savvy. (Figure 12 illustrates how an older adult advocacy group communicates using social media.) Planners recognized this diversity. They expressed concern that their profession might rely too heavily on newer technology and that this might inhibit the participation of older adults.

Older adults who are no longer able-bodied or who live in assisted living facilities are often overlooked in outreach, and their concerns may go unheard.

Planners also fail to recognize that social services agencies can serve as a valuable conduit in planning efforts. We heard that planners rarely work with social services providers and vice versa, although, in many instances, the two fields have similar goals. We heard both planners and social services providers express an interest in better understanding each others’ work and in finding ways to share resources to address common concerns.
Recommendations for Housing Land Advocates
Recommendations for Housing Land Advocates

Some of what we learned indicates that a training may not be the only or very best way to accomplish HLA's goal of having more older adults effectively engage in the planning process. While the scope of our project did not include an in-depth analysis of alternatives for accomplishing this goal, talking with older adults and planners did result in several ideas that Sage Places offers as alternatives to the methods used in this project. We hope that these recommendations will prove useful for other groups that work with older adults as well.

Recommendation 1: Consider a Mixed Approach
After conducting the training, and based on numerous meetings with diverse older adults around Clackamas County, we feel that the training approach will not work for all older adults, and that some people would benefit from more direct guidance from planning professionals. In addition, we see the training as a starting point, the beginning of an advocacy role that needs to be nurtured. To truly be effective, we would recommend HLA follow-up with the attendees and potentially convene them again around another issue or for a supplementary training.

Alternative 1: Develop a personalized approach for more experienced advocates
For certain individuals, particularly those with some previous experience in local planning, a more effective way of fostering ongoing engagement might be a personalized mentorship rather than a training. For some people this training may be too elementary, and they would be better served by either a more advanced training or one-on-one assistance understanding the processes associated with a particular issue of concern. Having a knowledgable contact they could call on for friendly advice or to inquire about various planning procedures would likely provide the most benefit to the more experienced older adult advocates.

Alternative 2: Mobilize a core group of advocates
If HLA were to continue to work with a small group of empowered advocates, they could likely mobilize them around key planning processes or initiatives that adversely impact older adults in Oregon. This same group of advocates could be trained, using a “train the trainers approach,” to conduct the training among their peers in their own communities across Oregon.

Alternative 3: Change the target audience
Instead of facilitating a training targeted at potential and current advocates, HLA can work to engage planners around specific issues that make it difficult for older adults to age in place. With some modification, several activities from the training could be used to get planners to think critically about the ways planning impacts aging issues. HLA could use parts of the training to create an abbreviated version for planners working in Oregon.

“I think this would be informative to other advocacy group members.”
- Recommendation from training participant
Recommendation 2: Deliver the Training to a More Homogeneous or Issue-Driven Group
For the purpose of this project, we focused on all of Clackamas County. As we quickly learned, Clackamas County encompasses quite a large area made up of urban, suburban, and rural communities, with differing governing structures and unique local concerns. While diversity is generally positive and leads to broader perspectives, the mixed backgrounds of the training participants made it challenging to focus on certain topics. By narrowing the geography of the training focus, HLA can more easily reuse the appropriate context and ensure that participants discuss issues that they can relate to. For instance, several parts of the current training highlight scenarios that would likely occur in an urban setting, which will not be relevant for training participants living in rural communities. Some parts of the training (for example, the visioning exercise) may be more powerful to a group of people who have a shared experience. That said, we recommend that HLA consider their target audience prior to replicating the training and make adjustments that are reflective of that audience and their goals.

Alternative 1: Focus the training around a shared interest or topic
For some audiences, it will be beneficial to focus the training around a common interest or a contentious issue, for example, a current comprehensive planning process or an affordable housing levy. There are also opportunities to shorten or eliminate aspects of the training and replace them with more detailed or local examples. Though we found the four-hour length of the training to be just right, HLA could break it into shorter 2-hour segments or even expand it into a training series with a core group of participants.

Alternative 2: Utilize the training in conjunction with other neighborhood and community advocacy activities
By partnering with local neighborhood and grassroots advocacy groups, HLA can share this training with a larger audience and perhaps provide a resource to other groups trying to achieve the same goals. Using existing networks will make it easier for advocates to establish an ongoing stake in local community planning issues. HLA could conduct the training annually at neighborhood association, hamlet or village meetings.

Recommendation 3: Share the Possibilities
Many older adults are not aware of the many planning processes and the possibilities that exist for them to impact planning. Because planning has grown and continues to evolve around them, older adults are often not aware of the innovations and tools that planners have at their disposal. They are often unaware of the “age-friendly” initiatives occurring in other locations. Likewise, older adults may not be aware of the array of available housing types, renovations, traffic modifications, or regulatory avenues that can
be pursued to support the development of certain housing types or foster aging in place. To fully engage older adults in local planning, advocacy groups like HLA should do more to make individuals aware of the range of possibilities.

**Alternative 1: Utilize the internet or newsletters to share information**

In addition to posting the Sage Places training guide and recommendations on HLA's website, HLA should continue to update their site with current examples of planning and development designed to meet the needs of older adults (in Oregon and elsewhere). This could take the form of links to creative and innovative approaches to planning for an aging population or even a video of successful examples. Training participants were very interested in learning about what other communities are doing to address growing aging populations.

**Alternative 2: Develop a tour of local affordable housing sites**

While our training was constrained by time and resources, we would have liked to incorporate a more in-depth look at some of the innovative approaches to providing affordable housing to older adults on a fixed-income. HLA could develop a short field tour program that visit a handful of local affordable housing developments, such as those in Figure 13; this would give older adults a greater understanding of the types of developments they can advocate for locally. Introducing people to the innovation and quality of today’s models could be effective in reducing opposition to affordable housing in some communities.

**Alternative 3: Incorporate a walkability or visitability tour into training program**

HLA could take participants on a brief walk to illustrate basic walkability and accessibility issues; this would give participants tangible examples to remember and would likely enhance their ability to identify barriers and opportunities within their own communities.

**Recommendation 4: Utilize Young Adults in Advocacy Efforts**

Many of the older adults we met with were interested in our project and thrilled to see young people showing interest in these issues. Utilizing strategies that bring the young and old together harnesses new energy and leads to a rich and rewarding experience for all who are involved. We believe HLA and other advocacy groups should keep this in mind as they try to engage older adults in community planning or other civic activities.
Alternative 1: Continue to use the strengths and resources of students
Sage Places team members were excited to work on a project with lasting impact; HLA can continue to look for opportunities to engage college and university students in their advocacy efforts. By building relationships with the various universities and colleges in Oregon, HLA can position themselves to reap the benefits of student energy and expertise. One option to work with students includes creating an internship position to coordinate trainings and continue engagement efforts post-training. Older adult participants of this project expressed enthusiasm for working with young people.

Alternative 2: Partner with advocacy groups that engage youth
HLA could conduct this training with an audience of both young and older adult advocates. HLA, along with AARP Oregon, should consider collaborations with organizations that have similar interests and incentives to become involved. For instance, parents of young children have many of the same concerns when they cross the street as many older adults. In fact, many of the elements that allow for aging in place improve conditions for people of all ages and do not necessarily have to be framed as “senior issues.” By working together on walkability and safety issues, both younger and older community members will benefit.

Recommendation 5: Keep Participants Involved
Several participants expressed interest in communicating with one another after the training was completed. Participating in a four hour training together allowed participants to learn from one another and create new connections. This shared experience creates new opportunities for HLA to maintain a group of motivated activists.

Alternative 1: Create follow-up trainings
HLA could develop more in-depth trainings in order to continue to engage older adults and build participants’ set of advocacy skills. For example, several participants expressed interest in visitability after viewing images of examples such as those presented in Figure 14. A follow-up training focused around this topic could keep participants engaged in advocacy while increasing their understanding of housing options.

Figure 14 – Examples of visitability presented at the training

Alternative 2: Create a forum for participants to continue to be involved
HLA could create a listserv or schedule regular meetings in order to update past training participants about upcoming opportunities to get involved. Another potential forum for continued communication between training participants is an online community such as Facebook.
Recommendations for Planners
Recommendations for Planners

Use Existing Resources
Many planners are already aware of existing resources about planning for an aging population but do not use them and instead rely on personal experience to understand older adult issues.

Leave time for Storytelling and Networking
Older adults have many stories to tell. Setting aside time for storytelling and networking serves a dual purpose. Not only is it validating for the storyteller to feel that they are being heard, it provides insight that only comes from history and experience. By taking time to listen to older adults, planners will be better informed about their needs and barriers to aging in place. Therefore, when engaging in advocacy efforts, we recommend building in opportunities for older adults to talk and share their stories.

Engage Older Adults in Pro-Active, Rather than Re-Active Planning
Many of the older adults we spoke with told us stories of negative experiences they had with a planner or planning process in their community. Though some of these experiences were the result of misunderstanding or poor communication, many of them were simply the nature of reactionary planning. Older adults often become involved in an issue in an attempt to halt or slow an impending project they perceive will have a negative impact or outcome on their property. We heard from planners and older adults that there were far fewer instances where older adults were involved in long-range projects like community visioning processes or planning for aging residents. However, when older adults took part in activities such as these, they generally had positive experiences. We recommend that planners develop more opportunities for older adults to participate in long-range planning and create a place for their input within larger planning processes.

Some methods to accomplish this include:
- Listen to older adult stories about their concerns and then connect those concerns to long-term planning efforts.
- Use real-life examples that result from long-range planning (the transportation people used today, where they last bought groceries, etc.).
- Discuss the impacts of long-term planning on future generations, and create opportunities for intergenerational discussions.
- Create committees made up of older adults that act as the “watchdog” group for older adult needs.

Consider Non-Traditional Outreach Strategies
While many planners we spoke with thought that older adults were already active in local planning processes, referring to them as the “watchdog types” or as “retirees with a lot of time on their hands,” we found that only a very small subset of the older adult population fits this description. Consistent with public participation trends in general, marginalized and underrepresented older adult groups are almost entirely left out of the process.
Ways that planners can seek input from and involve underrepresented groups include:

- Go to locations where older adults congregate, including churches and community organizations. On the advice of a local senior center director, we spoke with a group of older adults that meet regularly at a non-traditional location – a local bowling alley as seen in Figure 15.
- Locate existing informal networks by talking with community leaders and professionals that work with older adults, and using those networks to broaden the scope of outreach and gain local trust.

Figure 15 – The Molalla Bowl is an example of a non-traditional venue where planners can seek out older adult opinions.

(See Appendices A, B, and E for more information about our experience conducting outreach.)

**Collaborate with Social Services Providers**

Many planners consider aging a social services issue and equate aging with disability. Instead, planners should work with social services providers to plan communities that allow for aging in place. Working with social services providers can also help planners to reach out to and learn from marginalized or underserved populations. Moreover, social services providers may be able to offer planners unique insight regarding the needs of vulnerable or overlooked community members.

Options for collaborating with social services professionals include:

- Create data-sharing agreements - social services agencies conduct community needs assessments that may include valuable information for planners. Invite social services providers to take part in local planning efforts – either formally as members of an advisory committee or informally by holding meetings at sites where social services are provided.
- Look for ways to create informal networks and relationships with social services providers, such as facilitating brown bag lunches or other informal get-togethers.

**Collaborate with Advocacy Groups Already Working with Older Adults**

Invite these groups (such as AARP or Elders in Action) to participate in planning efforts through technical advisory committees or other mechanisms.
Limit the Use of “Planner-Speak”
Many planners speak using terminology and acronyms that are well known within planning organizations but completely foreign to the general public, such as those presented in Figure 16. Through our research, we found that people were looking for simple, easy to understand language. Some of the older adults we spoke with told us they were turned off by planners who did not speak to them in plain and accessible language.

Figure 16 – Much of “planner-speak” can be said in plain English
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Secondary Research and Bibliography
Secondary Research and Bibliography

Secondary Research
The secondary research was mainly conducted in the early phase of this project. The research began in December and January when we identified the problem and defined the project; however, the bulk of the research about aging and planning and educating older adults was conducted between mid-February and mid-April. Through reviewing the existing literature and analyzing secondary data, such as Census information, we identified issues that defined this project, learned about what has been discovered previously, and discovered themes to be explored during our outreach. These existing resources also provided important technical and methodological guidance on such as survey development and education materials development.

We set out to gain an understanding of the issues related to older adults and planning that have and have not been examined by scholars, practitioners, and advocates. We focused on answering the several broad questions.

• How do planning processes meet or fail to meet the needs of older adults?
• What barriers do older adults face in civic engagement?
• What barriers do planners face when attempting to engage older adults in planning?
• How does the planning system impact the needs of older adults?
• What are examples of best practices in planning for older adults and engaging older adults in planning?

• What are the issues specific to Clackamas County?
• What teaching methods and learning environments are ideal for older adult students?
• How should training materials be designed for older adults?
• How do older adults see themselves fitting into planning processes?

Some of the themes that emerged included:

• There is extensive research on the built environments that best support older adults but little research on how this should be implemented;
• Local and state governments often do not have resources, such as funding for transportation, to facilitate civic engagement of older adults;
• There is little research about what barriers planners face when trying to engage older adults in planning processes;
• The most frequently cited concerns for older adults involve housing, transportation, and health care;
• Younger older adults (45-54) are generally reluctant to think about aging.
• Organizations can continue to benefit from older adults who provide knowledge and volunteer or work part-time.
• There is tremendous diversity amongst older adults.
• Inter-generational ties can be strengthened.

Using this information, we developed a series of interview and survey questions to test the themes and to gather information to address the gaps.
Bibliography


Secondary Research and Bibliography


Secondary Research and Bibliography


Secondary Research and Bibliography


Secondary Research and Bibliography


Secondary Research and Bibliography


Appendices
Appendix A: Older Adult Interviews

Selection of Participants
In order to better understand why certain older adults are more actively engaged in planning than others, we sought out the opinions of those who have been involved with community planning. Potential older adult interviewees were identified by a variety of sources, including the following:

- recommendations from our Technical Advisory Committee;
- a list of individuals who attended a livability summit hosted by AARP in summer 2009;
- word of mouth recommendations from other older adults interviewed;
- recommendations from planners in Clackamas County; and
- newspaper articles highlighting the activities of older adult leaders.

Using these sources, we created a list of potential contacts. We then selected interviewees based on the following criteria:

- interest and availability to spend 45-60 minutes talking with us; and
- geographic representation that would include urban, suburban, and rural residents.

Interviews and Analysis
Interviews were conducted with nine older adults. Five interviews were conducted over the telephone, and four were conducted in-person. In addition to the one-on-one interviews, a focus group was also held with older adults active in a low-income senior housing land use case in Clackamas County. Interviews roughly followed the questions listed below, but topics were flexible depending on the responses provided by the participants. Notes were taken during each interview. Following the interview, responses were entered into a database and later analyzed for common themes.

Analysis Summary
Some of the common themes that emerged from the interviews included:

- There are older adults engaged in planning, but there are large segments of the population such as minorities and low-income individuals who are not represented.
- Actively involved older adults would like to see more of their peers involved in planning.
- There is concern that planning is not adequately preparing for the coming aging boom.
- There is a recognition that some communities are ill-equipped for aging in place and that some individuals are reluctant to prepare for a future in which they may have less mobility and other health concerns.
- Lack of affordable housing options for older adults is a concern.
Even people who are experienced with planning find the processes and regulations confusing. There does not appear to be many people advocating for the needs of the aging populace in general. There are varying levels of involvement, but a high value is placed on having the opportunity to share one’s own experiences with planners and peers.

Instrument
We asked the following question of older adult interviewees.

Issues in Your Community
1. Can we start with you telling me a little bit about your average day?
2. What types of places do you go to?

(This question should give interviewer some background that can be used for follow-up questions)

Transportation
1. When you’re going somewhere (like the grocery store or the doctor’s office), how do you typically get there?

(Drive my own car, a friend or family member drives me, take public transportation, take a para-transit vehicle, shuttle, or mini-bus like Clackamas County’s TRP service, taxi, walk, bike, combination, etc.)

Land Use/Services
1. Are the services and amenities you use most frequently available in your neighborhood?
2. If not, where do you go to get the things you need?
3. Do you think you would benefit from more or less commercial in your neighborhood?

Appendix A: Older Adult Interviews

The following questions are contingent on above responses.
2. Do you ever take public transportation?
3. If you have recently taken public transportation, how would you describe your overall experience?

(Easy to use, difficult to use, not available in my area, does not apply etc.)

4. Do you ever bike for transportation? 
5. Do you ever bike for exercise?
6. If you don’t bike, what do you think prevents you from doing so?

(Safety/comfort concerns, nowhere to go, physical ability, etc.)

7. Do you walk to local destinations (like a neighborhood coffee shop, the drug store, or a park)?
8. Or for exercise?
9. If you don’t generally walk to places or for exercise, what do you think prevents you from doing so?

(Safety/comfort concerns, nowhere to go, physical ability, etc.)
Appendix A: Older Adult Interviews

Housing
1. Where do you currently reside?
   (In a house, in an apartment, in a retirement community, in assisted living, with a relative or friend, in a mobile home park, etc.)
2. Do you own or rent?
3. Do you live alone or with others?
4. How long have you lived at your current residence?
5. How long have you lived in Clackamas County?
6. Do you anticipate moving in the future?
7. If so, what characteristics would you like in your new community? Your new home?
8. Would you say that your current community meets your needs well? What about your home?

General
1. Can you think of specific (physical) things about your community that are challenging to you now?
2. In general, what would make your community better for older adults?
   (New roads, buildings, recycling efforts, etc.)

Involvement in Planning Efforts
1. What information sources do you use to learn about changes taking place and issues in your area?
   (Newspaper, radio, television, library, Internet, word of mouth, senior publications, etc.)
2. Which sources do you use the most often?
3. Do you currently participate in local planning efforts?
4. If so, in what ways?
   (Attend neighborhood association meetings, keep up with important local land use decisions, attend public open houses, write to your local policymakers, etc.)
5. Do you feel your input is valued and affects end decisions?
6. If not, what are your reasons for not getting involved?
   (No interest, no time, not accessible, don't know about opportunities, transportation problems, cost, language barriers, don't match my interests, not available, I don't feel my input is valued, etc.)
7. How do you want to be involved (preferred methods of participation/engagement) and why?
   (Surveys, interviews, open houses, presentations before my community group [neighborhood assoc., senior center], door-to-door, tabling [at events, malls, etc.], writing to elected officials, writing to the Planning Department, writing letters to the editor)
8. What time of day/days of the week are best for you to attend public events?
9. Do you feel well informed about how planning decisions are made?
Appendix A: Older Adult Interviews

10. Would you be willing to participate in a follow-up focus group?
11. Are you interested in participating in training (in late April/early May) about transportation, housing, and land use planning in Oregon and how you can become involved?
12. Do you know of other older adults in your community who might be interested in talking with us about their experience?

Demographics
Let me know if you’re not comfortable answering any of these.

1. Zip Code?
2. What year were you born?
3. Gender (look, but don’t need to ask)
4. What is the highest grade that you’ve completed?
5. Do you consider yourself of low, average, or high income?

(Have some ranges available based on Census data if respondent asks)

6. How would you describe your current employment status?

(Self-employed, part-time; self-employed, full-time; employed, part-time; employed, full-time; retired, not working at all; not in labor force for other reasons; unemployed but looking for work; etc.)

7. How would you describe your race?

(Hispanic/Latino; White/Caucasian; Black/African American; Native America/Alaskan; Asian/Pacific Islander; Multi-ethnic; Decline to state)
Appendix B: Older Adult Focus Group and Small Group Interviews

Selection of Participants
In an effort to interview older adults who were not actively engaged in planning, we developed recruitment strategies that differed from those used to recruit active older adults. Instead of relying on recommendations for specific individuals, we instead brainstormed (with assistance from our Technical Advisory Committee) locations where older adults typically gather. Ideas included:

- churches;
- shopping malls (specifically mall walkers in Clackamas Town Center);
- coffee shops;
- bowling alley (on the advice of a local senior center director); and
- low-income housing developments.

We created flyers to advertise that we would be holding casual interviews on the topics of aging and transportation, housing, and land use; the flyers indicated the date, time and location these interviews would be held and that we would provide refreshments. We then arrived at these locations and interviewed the older adults who showed up. Although we were often prepared for no-to-minimal attendance, we found this method surprisingly effective.

Interviews and Analysis
One focus group and four small group interviews were conducted with 32 older adults. Similar to the interviews conducted with active older adults, these interviews roughly followed the questions listed in the following pages but were flexible depending on the responses of participants. Notes were taken during each interview. Following the interviews, all responses were combined and analyzed independently by two Sage Places team members for common themes. The two team members then reviewed their analysis together to address any discrepancies.

Analysis Summary
- Housing alternatives for older adults are expensive. Housing affordability was a concern for many participants.
- Low-income participants expressed that there are not enough affordable options for them; higher income participants expressed concern that their options were too limited – low income and high income choices with few options in the middle.
- Homeowners expressed concerns about rising property taxes driving them out of their homes; renters were concerned about rising rents.
- The residents of the low-income senior housing in Estacada did not express concerns about housing affordability.
Appendix B: Older Adult Focus Group and Small Group Interviews

- Housing issues (expense, difficulty maintaining, physical limitations) drive decisions to move rather than transportation.
- Most participants have not made concrete plans for housing that will meet their needs as they age, though some have thought about it. The participants who were engaged in the Lake Oswego case seemed more aware and proactive – one had just downsized and several were interested in the new development as an opportunity to meet their housing and transportation needs.
- Many participants continue to drive, and there is little planning for a time when they are unable to drive; several expressed that their children would have to deal with it or they themselves would figure it out when that day arrives.
- Many participants expect that children or friends will help them with transportation when they are unable to drive.
- Participants had mixed awareness of public transit alternatives (likely due to the fact that many continue to drive)
  - Some consider it safe but inconvenient; others expressed concerns about safety.
  - Even with little awareness/knowledge of the transit options, several participants noted that they might be able to rely on transit later if they needed to based on experiences of friends and neighbors who rely on transit.
- Rural residents do not feel they have necessary amenities in their communities, while suburban residents feel they do.
  - Most participants did not express a desire for much new development.
  - Estacada participants noted that they would like an affordable grocery store in their community.
- Participants are not generally involved in local decisions. The main civic activity noted by participants was voting. It was unclear if this was due to a lack of understanding about the decision-making process or other reasons.
- There was a general perception among participants that their input does not matter in decision-making; they also have a history of distrust of planning.
- Participants indicated that they prefer face-to-face communication.

Instrument

Demographics
(We won’t ask them to respond to the group, but this is important information to request.)

Experience & Needs of Older Adults

Discuss housing
1. Where do you currently live? (location and type of housing)
2. Do you anticipate moving in the future? If so, what do you think about the housing options?
3. Do you think you will stay in this community or go elsewhere? What would you prefer?
4. How should planners address this (if issues are raised)?
Appendix B: Older Adult Focus Group and Small Group Interviews

Discuss transportation
5. How do you currently get around?
   – Do you feel this is a reliable option? Do you anticipate using this option as you age?
   – What works about this mode? What doesn’t?
   – How should planners address this (if issues are raised)?

Discuss land use
1. Do you feel that you have access to services (health care, groceries, retail) in your community?
2. Do you feel that your access may change as you age?
3. How should planners address this (if issues are raised)?
4. When you or your peers find that the transportation system (or housing, or land use) is not meeting your needs, how do you respond?
5. If you wanted planners to address one issue that is important for older adults in their planning efforts, what would it be?

Interest in Future Involvement
1. Do you or your peers have interest in getting involved in long-term planning decisions? Why or why not?
2. Are you interested in learning more about how you can get involved in planning decisions?

Involvement in Planning/Experiences
1. Have you ever been involved in a planning decision? (Ex. Getting a permit from the County, attending a council meeting on a proposed project, participating in an open house for a comp plan update?)
   – What got you involved or what prevented you from getting involved?
   – Tell us about the experience?
   – Was the process straightforward?
   – Did you feel like you were able to get all the information you needed?

Are their interests being represented in planning?
1. Do you feel that your needs and the needs of your peers are being addressed when it comes to transportation, affordable housing, and land use planning?
2. Do you feel that planners are effective at reaching you and your peers when it comes to these issues?
   – How could they be more effective?
   – What is your preferred way to voice your opinions in planning decisions?
Appendix C: Planner Survey

Selection of Participants
To gain an understanding of planner’s awareness of older adult issues and their perceptions of older adult involvement in planning processes, we developed an online survey to be distributed to professional planners statewide. A notice about and link to the online survey was distributed through the Oregon Chapter of the American Planning Association website and listserv as well as the listserv for Portland State University Master of Urban and Regional Planning alumni.

Survey Analysis Summary
73 responses were received from current and retired professional planners throughout the state of Oregon. The findings from the survey are summarized based on the characteristics of the respondents, general contextual findings, and differences among subgroups.

Characteristics of the Respondents
The survey targets Oregon planners; distribution sources such as the OAPA and the MURP listserv were successful in gathering information from this group. Of all respondents, 93.2 percent identified themselves as planners. Similar to the planning structure, most (about 48 percent) of the planners are employed in the local public sector, about 22 percent are employed in the private sector, and the rest are employed in other public sectors such as county, regional, state and federal governments. A majority of the respondents primarily works in an urban setting with; few respondents work in suburban or rural settings as shown in Figure C2.

The respondents from the planner survey are diverse, including respondents of different ages and a broad spectrum of working experiences. Sixty percent of respondents are female and thirty-four percent are male. Almost all the survey respondents are between 25 and 64 years old. In terms of working experiences, over half the respondents have more than 10 years’ experience.
About 60 percent of respondents believe it is very important or somewhat important to receive input from older adults. Over two-thirds (69 percent) planners think engaging older adults in planning requires different methods than engaging other populations. On the other hand, 58 percent of the planners think older adults are more involved in planning than the rest of the population, and 56 percent of the planners think older adults are effective advocates. However, only about 30 percent would always, often or sometimes target older adults. Fifty-four percent of respondents make special accommodation for older adults to participate in the planning processes. The primary accommodation involves choosing accessible locations and times for public events.

About 96 percent of the respondents have organized or performed public involvement activities. The most common outreach methods include: community meetings, presentations, public notices, and open houses. For those who target older adults in their outreach, community meetings are used most often. Interviews and presentations are also used fairly often.

General Contextual Findings
Planning Practices and Perceptions
About 30 percent would always, often or sometimes target older adults. Fifty-four percent of respondents make special accommodation for older adults to participate in the planning processes. The primary accommodation involves choosing accessible locations and times for public events.
Appendix C: Planner Survey

Communication
Fifty-four percent of the planners prefer citizens to contact them by email, twenty-eight percent preferred to be contacted by phone, and only seven percent preferred being contacted in person or during public events. Most planners agreed that interviews are most effective in engaging older adults, followed by community meetings, presentations, open houses. Conversely, websites are perceived to be least effective in engaging older adults.

Figure C6 – How respondents prefer to be contacted

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>54%</td>
</tr>
<tr>
<td>Phone</td>
<td>28%</td>
</tr>
<tr>
<td>Mail</td>
<td>1%</td>
</tr>
<tr>
<td>In Person</td>
<td>3%</td>
</tr>
<tr>
<td>Public Events</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
</tr>
</tbody>
</table>

Table C1 - Perceived impacts of factors affecting older adult participation

<table>
<thead>
<tr>
<th>Rank</th>
<th>Factor</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Access to Public Events</td>
<td>1.72</td>
</tr>
<tr>
<td>2</td>
<td>Access to Information about Public Events</td>
<td>2.01</td>
</tr>
<tr>
<td>3</td>
<td>Older Adults Involvement in Advocacy Group</td>
<td>2.12</td>
</tr>
<tr>
<td>4</td>
<td>Familiarity w/ Terminology</td>
<td>2.18</td>
</tr>
<tr>
<td>5</td>
<td>Access to Information about Current Issues</td>
<td>2.25</td>
</tr>
<tr>
<td>6</td>
<td>Understanding of Technical Information</td>
<td>2.25</td>
</tr>
<tr>
<td>7</td>
<td>Familiarity w/ Planning Process</td>
<td>2.45</td>
</tr>
<tr>
<td>8</td>
<td>Knowledge of Local Laws</td>
<td>3.09</td>
</tr>
<tr>
<td>9</td>
<td>Knowledge of State Laws</td>
<td>3.26</td>
</tr>
</tbody>
</table>


Barriers to Participation
Planners believe that, among the factors that affect older adult participation in planning, accessibility to meetings and access to information about public events are the top two factors with the greatest impact on older adult participation. However, involvement in advocacy groups, understanding the terminology, access to information about current issues, understanding the technical information, and familiarity in the planning process also play a strong role in older adult public participation. Knowledge of local and state law is the least important factor.

Planning and Addressing Older Adult Needs
About 40 percent of planners rate their organizations as doing well or very well addressing the needs of older adults. Planners generally perceive access to daily services, health care, access to transit, affordable housing, access to social services, and social isolation as highly important issues for older adults. Older adult housing, land use, and transportation needs are at least somewhat considered during planning process at least 60 percent of time.

Planners considered themselves somewhat knowledgeable to knowledgeable about transportation, housing, and land use issues related to older adults but considered themselves less knowledgeable about active living, health, and economic development. Planners believe that a better understanding of older adult concerns related to planning issues would improve
Respondents from the public sector are less likely to target older adults, than those working in the private sector, as shown in Figure C7. However, the public sector planners are more likely to provide accommodation to older adults during the planning process than planners from the private sector.

Table C2 – Perceived importance of older adult issues

<table>
<thead>
<tr>
<th>Rank</th>
<th>Issue</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Access to Daily Services</td>
<td>1.21</td>
</tr>
<tr>
<td>2</td>
<td>Health Care</td>
<td>1.29</td>
</tr>
<tr>
<td>3</td>
<td>Access to Transit</td>
<td>1.33</td>
</tr>
<tr>
<td>4</td>
<td>Affordable Housing</td>
<td>1.35</td>
</tr>
<tr>
<td>5</td>
<td>Access to Social Services</td>
<td>1.50</td>
</tr>
<tr>
<td>6</td>
<td>Social Isolation</td>
<td>1.69</td>
</tr>
<tr>
<td>7</td>
<td>Access to Personal Vehicle</td>
<td>2.53</td>
</tr>
<tr>
<td>8</td>
<td>Employment</td>
<td>3.00</td>
</tr>
</tbody>
</table>

Table C3 – Effectiveness of resources to improve older adult participation

<table>
<thead>
<tr>
<th>Rank</th>
<th>Resource</th>
<th>Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Better Understanding to Older Adults Needs</td>
<td>1.87</td>
</tr>
<tr>
<td>2</td>
<td>Better Understanding to Older Adults Concerns with Planning Processes</td>
<td>1.96</td>
</tr>
<tr>
<td>3</td>
<td>Stronger Partnership with Older Adults Community Group</td>
<td>1.97</td>
</tr>
<tr>
<td>4</td>
<td>Opportunities to interact with Older Adults</td>
<td>2.07</td>
</tr>
<tr>
<td>5</td>
<td>Staff dedicated to Older Adults Issues</td>
<td>2.78</td>
</tr>
<tr>
<td>6</td>
<td>Funding for Older Adults Outreach</td>
<td>2.80</td>
</tr>
</tbody>
</table>

Figure C7 – Frequency targeting older adults (by sector)

Figure C8 – Different methods of outreach required for older adults (by sector)
Appendix C: Planner Survey

Respondents working in the private sector are more likely to think that their organizations are doing well or very well in addressing older adult needs than those working in the public sector.

Respondents from the private sector are more likely than public sector planners to think that older adults are effective advocates for their needs.

Differences by Work Setting, Age, and Experience
Respondents working in the rural setting are more likely than urban or suburban planners to think that older adults are more involved than the rest of the population.

Figure C9 – Perceptions of older adult effectiveness in advocacy (by sector)

Planners with more planning experience or who are older are less likely to target older adults during planning processes than younger planners. Younger planners regard older adult input as of great importance; this perception decreases with the older age groups of planners.

Figure C11 – Respondents who believe older adult input is Important or Very Important (by age)
Planners with 10 years or fewer working experience tend to believe that engaging older adults requires different methods than the general public. However, planners with over 10 years of experience are less likely to think engaging older adults requires different methods.

**Figure C12 – Different methods of outreach required for older adults (by experience)**

<table>
<thead>
<tr>
<th>Years of Experiences in Planning</th>
<th>Percent Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 years or less</td>
<td>81.3%</td>
</tr>
<tr>
<td></td>
<td>9.4%</td>
</tr>
<tr>
<td></td>
<td>9.4%</td>
</tr>
<tr>
<td>over 10 years</td>
<td>58.5%</td>
</tr>
<tr>
<td></td>
<td>22.0%</td>
</tr>
<tr>
<td></td>
<td>19.5%</td>
</tr>
</tbody>
</table>

**Differences by Gender**

Female planners are less likely than male planners to target older adults or to provide special accommodation to older adults in planning processes.

**Figure C13 – Frequency targeting older adults (by gender)**

<table>
<thead>
<tr>
<th>Frequency of Targeting Older Adults</th>
<th>Percent Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always/Often</td>
<td>25.0%</td>
</tr>
<tr>
<td>Sometimes</td>
<td>16.7%</td>
</tr>
<tr>
<td>Rarely/Never</td>
<td>70.7%</td>
</tr>
</tbody>
</table>

**Other Differences**

In general, planners who always or often target older adults in planning are more likely to believe that engaging older adults requires different methods and are more likely to provide special accommodation to older adults than those who rarely or never target outreach efforts to older adults.
Appendix C: Planner Survey

Instrument
Online survey text:

We are five students in the Master of Urban and Regional Planning program at Portland State University working on a project involving older adults and planning. We appreciate your participation in this brief online survey. The survey includes questions related to the engagement and participation of older adults in your work. For the purposes of our research, “older adults” generally refers to persons 65 years or older.

The survey should take approximately 10-15 minutes to complete. Responses will be analyzed and results will inform our June 2010 report. Individual response will be remain confidential. Additional information about our project can be found online at www.sageplaces.com. Final documents will be posted there as well.

1. Have you organized/performed public involvement activities?
   - Yes
   - No

2. What type(s) of public involvement activities have you organized/performed? Please check all that apply.
   - Interviews
   - Focus groups
   - Surveys
   - Websites
   - Public notices
   - Community meetings
   - Presentations (e.g., at neighborhood associations)
   - Open houses
   - Workshops
   - Charrettes
   - Other (please specify)

3. How often do you specifically target older adults in you public involvement activities?
   - Always
   - Often
   - Sometimes
   - Rarely
   - Never
   - Don’t know
4. What approach(es) have you used to specifically seek out input from older adults?
   - Interviews
   - Focus groups
   - Surveys
   - Websites
   - Public notices
   - Advertise in/at senior focused periodicals, event, senior centers
   - Community meetings
   - Presentations
   - Open houses
   - Workshops
   - Charrettes
   - Other (please specify)

5. Do you make special accommodations for older adults in order to enhance or increase participation?
   - Yes
   - No

6. What special accommodations do you make to enhance or increase participation of older adults?
   - Use larger print
   - Bring audio equipment to amplify speaker
   - Provide transportation
   - Provide refreshments
   - Locate meetings/open houses at accessible venues
   - Locate meetings/open houses at locations accessible by multiple modes of transportation
   - Provide transportation for attendees
   - Hold meetings at senior centers, retirement facilities
   - Other (please specify)

7. How important to your work is it to receive input from older adults?
   - Very important
   - Important
   - Somewhat important
   - A little important
   - Not very important
   - Don’t know

8. What is the preferred method for citizens to contact you?
   - Phone
   - Email
   - Mail
   - In person
   - Public events
   - Other (please specify)

9. Among the following public involvement approaches, please RATE their effectiveness in engaging older adults. On a scale from 1-5; 1 = Most effective and 5 = Least effective.
   - Interviews
   - Focus groups
   - Surveys
   - Websites
   - Public notices
   - Community meetings
   - Presentations
   - Open houses
   - Workshops
   - Charrettes
Appendix C: Planner Survey

10. Do you think engaging older adults in planning requires different methods than engaging other populations?
   - Yes
   - No
   - Don’t know

11. How does the level of participation of older adults in planning processes compare to other populations?
   - More involved
   - Equally involved
   - Less involved
   - Don’t know

12. In your opinion, how do the following factors affect older adults’ participation in the planning process? On a scale of 1-5; 1= Significantly, 5= Little or no affect and 6= Don’t know.
   - Familiarity with terminology
   - Understanding of technical information
   - Familiarity with planning processes
   - Knowledge of local laws
   - Knowledge of state laws
   - Access to information about current issues
   - Access to information about public events
   - Access to public events (e.g., transportation to event venue, timing of event, etc.)
   - Older adults’ involvement in advocacy groups

13. Please rate the effectiveness of the following to improve your ability to better involve older adults in planning. On a scale of 1-5; 1=Most effective and 5=Least effective.
   - Dedicated funding for older adults outreach
   - Staff member(s) dedicated to older adults issues
   - Better understanding older adults’ concerns related to planning issues (e.g., how their needs related to transportation, land use, and housing differ from the general population)
   - Better understanding older adults’ concerns related to planning processes (e.g., engagement methods that can better involve older adults in planning decisions)
   - Opportunities to interact with older adults
   - Stronger partnerships with older adult community groups

14. How well do you think your organization’s planning efforts address the needs of older adults?
   - Very well
   - Well
   - Neither well or nor poorly
   - Poorly
   - Very poorly
   - Don’t know

15. Regarding the following issues, to what degree are the needs of older adults considered during the planning processes of your organization? (“A lot” to “Not at all”)
   - Housing
   - Land use
   - Transportation
16. Based on your opinion, please rate the importance of the following issues older adults face. On a scale of 1-5; 1=Very important and 5=Not very important.
- Affordable housing
- Access to transit
- Access to personal vehicle
- Access to daily services (grocery, mall, bank)
- Access to social services (community center, meals on wheels)
- Social isolation
- Health care
- Employment

17. Do you believe older adults are generally effective at advocating for their needs?
- Yes
- No
- Don’t know

18. Effectiveness of older adults at advocating for their needs. (Text response)
- What makes them effective?
- What makes them ineffective?

19. How would you rate your knowledge of planning issues specific to older adults in the following areas? On a scale of 1-5; 1=Very knowledgeable, 5=Not very knowledgeable and 6=Don’t know.
- Housing
- Transportation
- Land use
- Economic development
- Active living
- Health

20. How frequently do you use the following resources to gain knowledge of planning issues that relate to older adults? (Always to Never)
- Scholarly journals
- Internet search
- Guidance documents (such as the FHWA Older Driver and Pedestrian Handbook)
- News media (television, newspaper)
- Conferences
- Personal contact
- Interviews
- Advocacy groups (e.g. AARP)

21. Which of the following best describes your profession?
- Planner
- Engineer
- Advocate
- Academic
- Student
- Lawyer
- Other (please specify)

22. Are you employed by the:
- Public sector (local)
- Public sector (county)
- Public sector (regional)
- Public sector (state)
- Public sector (federal)
- Private sector
- Academia
- Retired
- Other (please specify)
Appendix C: Planner Survey

23. How long have you been involved in the planning profession?
   - Less than 3 years
   - 3-5 years
   - 6-10 years
   - 11-20 years
   - Over 21 years
   - Not involved in the planning profession

24. Which best describes the environment where most of you work is focused?
   - Urban
   - Suburban
   - Rural
   - Other (please specify)

25. What is the zip code of your primary work office?

26. Which age group do you belong to?
   - 18-24
   - 25-34
   - 35-44
   - 45-54
   - 55-64
   - 65+
   - Decline to state

27. What is your gender?
   - Male
   - Female
   - Decline to state

28. We would like to conduct brief follow-up interviews in late March to further learn about your experiences working with older adults. May we contact you to schedule a follow-up interview? (These can be conducted in person, via phone, or email.)
   - Yes
   - No

29. Please provide the following contact information so that we may contact you for a follow-up interview.
   - Name
   - Phone
   - Email
Appendix D: Planner Interviews

Selection of Participants
Our online survey of planners included a question asking participants if they would be available for a follow up phone interview. We contacted the planners working in Clackamas County who indicated that there were available. Although 31.5 percent, or 23, of the survey respondents indicated willingness to do a follow-up interview, relatively few of them work in Clackamas County. Therefore, we consulted with our Technical Advisory Committee to identify additional Clackamas County planner interviewees. We sought to have a broad representation of planners and took the following into consideration:

- geographic representation of planners working in urban, suburban, and rural locations;
- focus of their planning efforts to capture transportation, land use, and housing issues;
- varying levels of professional experience and seniority within planning organizations; and
- representation of private and public sector planners.

Interviews and Analysis
We conducted 13 telephone interviews in April 2010; interviews generally followed the questions listed below. Notes were recorded and later combined into a single document for analysis. Two team members independently reviewed the responses and developed a list of common themes. The two team members then reviewed their analysis together to address any discrepancies.

Analysis Summary
Key themes that emerged during our interviews with planners include:

- The older population does appear to be well-represented but not necessarily over-represented in terms of sheer numbers. Older adults are attending planning related meetings, but they tend to represent themselves rather than the aging population as a whole.
- Many planners acknowledge that certain aging populations, like lower-income individuals, individuals with low educational attainment, individuals from minority groups, non-English speakers, people with cognitive or mental health issues, or renters, may be less represented or have lower levels of involvement. This is similar to the general population and not unique to older adults.
- Sometimes older adults think they need to take on a “watchdog perspective”.
- Planners need to be sensitive to how technology (such as web-based materials) can inhibit participation of certain populations, including older adults.
- Planners value older adults' personal networks for getting the word out and getting feedback. Their knowledge is viewed as a great resource.
Appendix D: Planner Interviews

• Older adults need to know:
  – the basics of planning processes, including the criteria used to make decisions and the constraints planners must work within*;
  – how to communicate effectively;
  – the importance of their participation; and
  – the value of getting involved in established advocacy and planning groups.

• It can be difficult to get older adults involved in long-range efforts. They are more likely to be reactionary and to respond to a particular proposal.

• Older adults, in general, view change negatively

• Much of planners’ understanding of older adult issues comes from experiences with their parents or other personal contacts. There is not widespread use of resources although there is recognition that there are resources available.

* This differed from the general response from the online survey in which planners responded that knowledge of planning basics was not that important.

Instrument

1. Several planners surveyed felt that, if anything, older adults were overrepresented at planning related events. Others have noted that this attendance is likely the result of them reacting to a specific proposal rather than being proactively involved in long-range planning and visioning for the needs of older adults in their communities. What are your thoughts on this?

2. Again with the over-representation question…
   Do you think this is true across all income levels? education levels? across all ages of older adults? across all ability levels? (or something to get at impairment...) What resources do you think older adults need to be better participants in planning processes?

3. From your perspective, what issues do you think will be most important for us to focus on during our training? What topics should we avoid?

4. Do you think training of the older adults about planning would be effective in helping them to voice their needs? Do you have other ideas on how to empower this group?

5. What are the biggest misconceptions that older adults have about planning processes or planners?

6. What’s most challenging about working with older adults?

7. How could older adults work better with you in the planning process?

8. What resources do you need to better plan for an aging population? Do you think planners are doing a good job planning for an increasingly aging population?
Appendix D: Planner Interviews

9. Do you think that planning for an aging population should be more explicitly part of your organization’s planning goals, or do you think that the emphasis you currently place on planning for an aging population is enough?

10. Many Planners indicated that the gather information about older adults through personal contacts, is that how you learn about issues related to older adults? If yes, what specifically are the means (talking to OA you know/ people who worked with this group/ organized groups etc)?

11. What ideas do you have for engaging older adults who may not be part of an organization? (For example, those older adults who are not actively involved with adult centers or other community groups/amenities)

12. How closely do you work with social service agencies? What ways could service providers help in the planning process?

13. Can you think of an example of a situation where the concerns of older adults were incorporated well into a particular planning process? What made this successful?

14. If you were to give a novice planner advice about working with older adults what would that advice be?
Appendix E: Training

Recruitment
HLA established a goal of 20-30 older adult participants for the training. In an effort to recruit an adequate number of participants for the training, we pursued multiple methods of advertising the training. We purchased advertising space in the May 2010 edition of *Boom! Boomers & Beyond* newspaper insert geared toward Baby Boomers for the advertisement seen in Figure E1. This publication has a circulation of 40,000 homes in the greater Portland metropolitan area and additional distribution in local senior centers, retirement homes, libraries and postal annexes. However, none of the participants in the training indicated that the advertisement was how they learned about the event.

Additional outreach strategies included:

- personalized invitations by mail or email to all older adults who participated in interviews and focus groups;
- personalized requests to planners to distribute or post the announcement seen in Figure E2;
- flyers at senior centers, community centers, and housing complexes;
- email announcements sent by AARP, Housing Land Advocates, Clackamas Community College, Elders in Action, and other advocacy groups;
- emails sent to churches throughout Clackamas County;
- listings on County and Metro event calendars;
- announcements sent to neighborhood associations and community planning organizations; and
- listserv announcements on CNRG and other community groups.

Based on our evaluations, more than half of the participants learned about the training from email and personal contacts. Other participants learned about the training from listservs, calendars, community centers, and from Sage Places’ website.
Participants were able to register for the training by email or phone. A voicemail account was set up that instructed participants to indicate their name, phone number, whether they required transportation assistance, and if they had any dietary restrictions we should consider when ordering lunch. Participants who registered via voicemail were called by a Sage Places team member to confirm registration. Similarly, those that emailed their registration were confirmed via email. All participants were contacted a few days prior to the training as a reminder and to offer detailed directions to the campus and classroom. A registration deadline was established six days ahead of the training to allow time for final training materials preparation and to place the catering order, however, several participants registered after this date – some registered only two days ahead of the training. One participant did not register in advance for the training.

Twenty-four participants registered in advance for the training. Sixteen participants attended, and one left early for a medical appointment. Poor weather, unanticipated transportation issues, and last minute appointments may be factors that contributed to the absence of registered participants. Additionally, some registered participants may not have felt obligated to attend, because the training was free, and no personal investment was lost as a result of absence.

**Location**

Based on the feedback we received from our Technical Advisory Committee and the conversations we had with older adults in Clackamas County, we determined that Oregon City would be the preferred location to host a training. Oregon City is the County chair and people indicated that they are accustomed to traveling there for meetings. We selected Clackamas Community College as the location, because a projector-equipped classroom could be reserved on campus for free and because the campus is accessible both by automobile and by transit.
We reserved vehicles with volunteers drivers through Ride Connection. Although one registered participant requested ride assistance, she was later unable to attend to the training. No other participants requested transportation assistance, and based on our in-training polling, all of the participants arrived by car.

**Time & Date**

In our conversations with our technical advisory committee, we heard that people would be more likely to attend a mid-morning meeting than one early in the morning or late at night. Although a great deal of material needed to be covered during the training, our technical advisory committee recommended that our training last no longer than a half day. It was suggested that a full day would be too long, and a training conducted over multiple days would likely lose participants and present logistical problems. This perception echoed what we learned in our literature reviews and in our older adult interviews. To accommodate participants traveling from the more rural areas of Clackamas County, we scheduled the training from 10am to 2pm to allow for travel to and from Oregon City. The training was scheduled on a Monday. We recognized that a weekday training could limit participation of older adults who continue to work, but through our conversations with older adults, we learned that Monday is a popular day for activities.

**Refreshments**

We also heard that people would be more likely to attend if food was provided. Through an on-campus catering service, we provided morning coffee and tea, as well as a free box lunch to all in attendance, accommodating dietary restrictions as needed. Although providing lunch raised the overall cost of the training, it allowed us to utilize the lunch time for an additional presentation, and attendees did not suggest changing this part of the training.

**Training Binder**

Each participant was provided a training binder that included the following materials:
- training schedule;
- information about Sage Places and Housing Land Advocates;
- handouts of all presentation slides with room for notes;
- copies of scenarios used for small group activities;
- guidance on public participation methods; and
- reference materials including an overview of planning, statewide planning goals, acronyms and definitions, and Clackamas County-specific planning contacts.

Volume Two includes a copy of the training binder materials. Volume Three includes the trainer’s manual, with suggestions for future facilitators of the training.

**Visual Materials**

Much of the material presented in the training was projected using a PowerPoint presentation. This included both the standard presentation slides (handouts of which were available in participants’ training binders) and an interactive survey system. In small groups, participants worked through three
problem scenarios. Their ideas were recorded by facilitators using large 3M easel pads, which allowed us to later post the ideas generated by the group onto the classroom walls for the entire class to view. During the debrief sessions immediately following the small group activities, we recorded participant responses on whiteboards in the front of the classroom. Directions to restrooms were also provided on these whiteboards for the duration of the training; this information was also verbally conveyed to participants.

**Facilitation**

We anticipated that participants would have a range of planning experience. Each small group activity was facilitated by a Sage Places team member to ensure that the conversations remained focused and that all group members had an opportunity to speak. Participants were divided into three groups, and a Sage Places team member worked with each group to record their ideas and prompt discussion as needed. If possible, it is ideal to rotate facilitators and/or participants so that participants have opportunities to work with different people during each exercise. Each facilitator had a copy of each scenario and a list of questions and answers, should ideas among the group stall or if they remained too focused on one element of the scenario.

A Sage Places team member, the “scenario leader,” introduced each scenario and lead the class in a debrief after all groups were finished generating ideas. While the scenario leader solicited ideas from each group, another team member recorded the ideas on the classroom whiteboard. The scenario leader then reinforced the key lessons learned during each scenario.

For example, while the scenario leader solicited ideas from each group on how to address a transportation safety concern, the ideas were written on the whiteboard categorized under “information gathering”, “outreach” and “action” activities. When several ideas had been written on the board, the scenario leader then explained that while each idea on its own was an appropriate response, combining information gathering activities with outreach and action activities might be a more effective strategy.

**Evaluation**

We collected feedback from participants through an evaluation sheet that was distributed at the close of the training. The evaluation asked key questions such as how the participants heard about the training, what motivated them to attend the training, how satisfied they were with training elements, and what content they would recommend adding or changing. It was necessary to remind participants that the evaluation was double-sided. Out of the 15 participants that returned an evaluation form, only one participant failed to complete the entire evaluation.

**Quotes from training participants’ evaluations**

“Thank you ‘future planners’ – great job!”

“Good energy, good focus to training.”

“It’s a topic I’ve been watching and reading about and now that some of the unknown has been taken out of the process, I would be willing to attend a planning meeting or contact my city planner with questions.”
Evaluation Summary
- The average age of participants was 62.13 years old, with youngest being 45 years old and oldest being 74 years old. Nine females and seven males participated.
- Our participants resided across Clackamas County (from most common to least): Lake Oswego, Oregon City, Mulino, Molalla, Sandy, West Linn, Forest Grove, Portland, and Salem.
- Personal invitation seems to work best for this group; no participants indicated that they heard about the training through the Boom! Boomers and Beyond insert. Over half (53 percent) of participants heard about the training through email. Other sources include mail, senior center, the Sage Places website, a public event calendar, and the Portland area cnrg.org listserv.
- All of the participants thought the length of the training was “just about right.”
- All of the participants indicated that they would recommend our training to their peers. Their main reasons being: learning about planning processes, to encourage involvement, and the importance of getting people thinking about the issue of an aging population.
- Major suggestions for future trainings include: bring an experienced planner to the training, conduct this training in a local area, include more rural content, providing more specific examples/dialogue for actions older adults can take to participate (e.g., an example of a letter to the editor), and provide more examples of options to engage stakeholders.
Figure E6 - Training evaluation

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
   - Planner
   - Social Services Provider
   - Other (Please Specify):

2) How did you hear about this training?
   - Boom! Boomers & Beyond Newspaper Advertisement
   - Invitation in the Mail
   - 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 Brent Calendar
   - 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:

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<th>Not at all Satisfied</th>
<th>Not Satisfied</th>
<th>Neutral</th>
<th>Satisfied</th>
<th>Extremely Satisfied</th>
<th>Don't Know</th>
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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.