

# Special Appropriations Grant

## Progress Report



\*Reporting Period: September 1 – December 31, 2016

[Check here if this is your FINAL Progress Report]  FINAL

<b>GRANTEE Organization Name</b>	<b>PSU, Institute on Aging</b>
<b>Project Title</b>	Age-Friendly Portland Initiative
<b>City Program Area**</b>	Community Health Grant

### Overall Project Status »

<b>Project Summary</b>	<p>In 2013, Portland City Council unanimously adopted the <i>Action Plan for an Age-Friendly Portland</i> in an effort to make Portland more age friendly or, a community for all ages and abilities. The ongoing implementation of the Action Plan is occurring through the work of the Advisory Council for an Age-friendly Portland and Multnomah County and five Committees (Civic Engagement, Economy &amp; Employment, Health Services &amp; Equity, Housing, and Transportation). This grant enables Portland State University to carry out coordination for the Advisory Council and Committees (i.e., serve as the “backbone” organization for the initiative, as well as implement strategic areas of the Action Plan).</p> <p>Specific activities carried out under this grant, in addition to regular meetings of the Council and Committees, include: (1) Redesign of the existing website (<a href="http://www.agefriendlyportland.org">www.agefriendlyportland.org</a>) to improve age-friendly communication and information; (2) Creation of a planning matrix aimed at improving the age friendliness of Portland’s housing stock with City and community partners; (3) Refinement of the Action Plan for an Age-Friendly Portland; (4) Planning and convening of the 2016 (10/29/16) and 2017 Aging Well conference (10/21/17); (5) Collaboration with PSU students and community partners to carry out the PSU Capstone course (spring, 2017); (6) 2016 annual progress report to City Council; and (7) Advancing contributions of older Portlanders and building intergenerational partnerships.</p>
<b>Successes</b>	<p>Many successes have been accomplished in the first quarter of the 2016-17 Age-friendly Initiative grant, including:</p> <ul style="list-style-type: none"> <li>• <b>Council and Committee meetings:</b> The Advisory Council for an Age-friendly Portland and Multnomah County and the five committees (Civic Engagement, Economy &amp; Employment, Health Services and Equity, Housing and Transportation) continued to meet in an effort to advance the <a href="#">Action Plan for an Age-friendly Portland</a> and the <a href="#">Multnomah’s County’s Age-friendly Action Plan</a>. The Council has also continued to “set the course” for the initiative, which continues to gain recognition among municipal staff, members of the community, and state, national, and international groups interested in the age-friendly movement.</li> <li>• <b>Age-friendly Housing:</b> Accessible and age-friendly housing that meets the growing needs of older adults and people with disabilities has been advanced through this grant. In particular, policy suggestions have been influential in Portland’s Residential Infill project and the relationships between the Age-friendly Portland initiative and the City of Portland’s Bureau of Planning and Sustainability and the Portland Housing Bureau have been strengthened.</li> </ul>

\* See your agreement document for project start and end dates Page 1 of 10  
 \*\* Refer to your application for the City Program Area  
 \*\*\* Use the approved budget line items from your application and agreement

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- **Portland State University’s University Studies’ Capstone course, Creating Age-friendly Communities (being offered Spring Term, 2017):** The development of the course [Creating Age-friendly Communities](#) continued, with the student projects coming into focus. In particular, a baseline assessment of intergenerational programs in the greater Portland region will be among the areas of emphasis. The university, the Age-friendly Advisory Council, and staff at the City of Portland continued to offer support in lining up project opportunities for the students.
- **Expanding intergenerational partnerships and opportunities:** As a result of the November 1, 2016, Encore.org regional convening (see below for additional details), age-friendly collaborators were able to expand knowledge and working relationships with individuals (e.g., Encore Fellows from the Social Venture Partners – Portland program) and organizations (e.g., Jesuit Volunteer Corps Northwest). Also, as mentioned above, the focus on intergenerational activities continues to be advanced through research and outreach efforts of Advisory Council and committee members.
- **First Age-friendly retreat:** On December 1, 2017 the Advisory Council for an Age-friendly Portland and Multnomah County convened for a first-ever retreat. Short- and long-term strategic goals were identified and, in addition to standing committees, the following short-term task teams were assembled: website development, documenting the history of the initiative, improving communication with newly elected officials, and developing an equity lens and decision making framework. Additionally, communication and logistical approaches were discussed and are being implemented moving forward.
- **Aging Well conference:** As detailed below, more than 150 attendees came to the 2016 Aging Well Conference held at Concordia University. Presentations were focused on age-friendly domains and were geared toward consumers of services (rather than professionals and/or academics); see below for additional details.
- **Website:** Early steps were taken to create a new website strategy, including developing a call for proposals to hire a website developer, and identifying important website content and functions.
- **Metrics/indicators:** As a starting point in the development of age-friendly indicators for Portland, more than 600 potential metrics were identified by Portland State University’s Institute on Aging and are in the process of being winnowed down.

### Challenges

Several challenges emerged in the first quarter of this project, including:

- **Action Plan:** Although the [Action Plan for an Age-friendly Portland](#) was among the first in the U.S. and the world, it is robust and covers many areas (10 domains); therefore, it remains difficult to implement with limited staff and resources.
- **Website:** The Age-friendly Portland [website](#) has been in need of redesign and updating, as the website designers (former students from the Pacific Northwest College of Art) are longer available for updates or troubleshooting. As the process for redesigning the website is time consuming (e.g., committee formation, calls for proposal, redesigning the site), the site has not had full functional capacity.
- **Policy changes:** As noted in the project narrative below, the age-friendly housing work has intersected with [Portland’s Residential Infill project](#). Although Dr. Alan DeLaTorre was a member of the project’s stakeholder advisory Committee, age-friendly and accessible housing policies were absent from the final Concept Report to the City. Although an amendment was introduced to “Direct Bureau of Planning and Sustainability staff to explore requirements and bonus units allowances for age-friendly...” this focused on bonus densities and not “by-right” development (e.g., requirements), which was proposed. Additional work is needed to ensure that the future housing stock in Portland meets the needs of Portlanders of all ages and abilities.

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	<ul style="list-style-type: none"> <li>• <b>Expanding partnerships:</b> As noted above, this can be seen as a success of the grant and the initiative. However, the ability to coordinate new partnerships and develop new strategies and approaches is limited by the availability of staff to cultivate new projects while simultaneously completing required tasks and deliverables that are in the current scope of work. For example, the City of Portland’s Auditor’s Office has shared data from the annual livability survey for the City to allow for age-specific analyses; however, the time required to conduct those analyses is not available. In general, Portland State University’s faculty have the ability to offer many research activities that can inform the delivery of programs and services, as well as the development of long-term policies that advance equity and sustainability in our community.</li> <li>• <b>Transitions in leadership:</b> As is the case with every election cycle, knowledge, understanding and trust must be rebuilt with newly elected leaders. Although we welcome the opportunity to work with Mayor Wheeler and Commissioner Eudaly, they were not available to meet prior to taking office in January, 2017.</li> <li>• <b>Metrics/indicators:</b> More than 600 age-friendly indicators have been identified by Portland State University’s Institute on Aging. This work is vitally important to Portland and Multnomah County, as well as other communities across the U.S. that are attempting to track progress and understand successes. However, much work remains. Researchers are currently reviewing the identified indicators and plan to share them with the Council and Committees to select a reasonable number that can be used moving forward to track progress and success, as well as areas of inequities and concern that should be addressed.</li> </ul>
<p><b>Project Narrative</b></p>	<p>Overall, the Age-friendly Portland Initiative is alive and well. This Community Health grant has provided funding to carry out the initiative and to continue to serve the City of Portland as a body that advises the directions of offices and bureaus, as well as other City and community efforts. We continue to implement the City Council-approved Action Plan for an Age-friendly Portland and are refining our communications (e.g., Council and Committee functions, website), measurements for success (see: Indicators/metrics section), ability to translate research into policy and practice, and effectiveness with respect to guiding policy and program development. The following provides updates on events, activities, projects, and efforts from September 1, 2016 through December 31, 2016.</p> <ul style="list-style-type: none"> <li>• <b>Council and Committee meetings:</b> The City of Portland grant provided support to the Age-Friendly Portland and Multnomah County Advisory Council. The Council met twice between September 1 and December 31, 2016 (9/26, 12/1; note: 12/1 was our first Council “retreat”), and the Executive Committee met twice (9/21, 11/10) in preparation for the full Council meetings. Additionally, the following Committee meetings occurred:             <ul style="list-style-type: none"> <li>○ Civic Engagement (9/15, 10/20, 11/17, 12/15)</li> <li>○ Employment and Economic Development (9/7, 10/5, 12/7)</li> <li>○ Health Service, Prevention &amp; Equity (10/3 – Community Health Workers task force)</li> <li>○ Housing (9/19 – strategic planning meeting with Committee leaders)</li> <li>○ Transportation (9/28)</li> </ul> </li> <li>• <b>Redesign of the existing website:</b> A limited duration Website Committee was formed with members of the Advisory Council and Elders in Action (note: Elders in Action currently hosts the <a href="http://agefriendlyportland.org">agefriendlyportland.org</a> website). The group began the process of developing a website strategy, creating a call for proposals for a website developer, and beginning the process of identifying website content and functions.</li> <li>• <b>Age-friendly housing:</b> Key partners from Portland State University (Institute on Aging, College of Urban and Public Affairs) and AARP Oregon met to discuss the strategy for developing a housing planning matrix to address key areas of age-friendly policy and action, as well values of community stakeholders. Two winter workshops in</li> </ul>

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February, 2017, were planned that included attendees from local government (City of Portland, Multnomah County, Metro), the private and nonprofit sectors, older adults and people with disabilities, and PSU faculty and students.

Age-friendly Housing Committee Chair and PSU researcher Alan DeLaTorre finalized a report to City Council titled [Residential Infill – Participant Observation Report](#) and shared the report with Portland City Council, the Bureau of Planning and Sustainability, and members of the community; additionally, at the request of City Council, a “menu of options” for housing accessibility policy was produced and shared with those noted above, and a [letter detailing the need for an accessibility amendment](#) to the City of Portland’s [Residential Infill Concept report](#) was offered. Please note that the 4<sup>th</sup> amendment to Concept Report item 4 – “Allow more housing types in select areas and limit their scale to the size of house allowed” – was proposed and passed, which detailed the following:

### **4th Amendment (Commissioners Fritz, Fish, Saltzman)**

“ADD: d) Direct Bureau of Planning and Sustainability staff to explore requirements and bonus units allowances for age-friendly, affordability, and tree preservation (beyond minimum required by Title 11) within the Housing Opportunity Overlay Zone in the R2.5, R5 and R7 zones. Note: this amendment incorporates a complimentary amendment to ‘pursue age-friendly requirements, such as visitability or accessibility standards for additional units.’”

### • **Refinement of the Action Plan for an Age-Friendly Portland:**

Three of the five committees began the process of drafting changes to the Action Areas of the Action Plan for an Age-friendly Portland: Employment and Economic Development; Transportation; and Housing. At the December 1, 2016, retreat for the Advisory Council, members discussed how to engage the City of Portland, Multnomah County, and members of the community in the refinement of the Action Plan.

### • **Advancing contributions of older Portlanders and building intergenerational partnerships:**

On November 1, 2016, [Encore.org hosted a regional convening](#) of members of the aging network (i.e., public, private, academic, and government actors attuned to aging issues) to map out strategies for collaboration and to increase intergenerational activities in 2017 and beyond. Several Age-friendly Council and Committee members were present, a retrospective presentation on Age-friendly activities from 2007-2016 was given, and efforts were undertaken to build additional intergenerational opportunities (e.g., older adults serving the needs of youth). Portland was selected as a site for a regional convening based on the longstanding age-friendly efforts and the willingness of the Age-friendly Council and Portland State University faculty (among others) to co-convene the event.

In addition to the Encore.org event, the Council and Civic Engagement Committees began exploring ways to increase partnerships and participation in existing programs and Dr. Alan DeLaTorre committed his spring 2017 course – Creating Age-friendly Communities (see below for additional details) – to conducting as baseline assessment of existing intergenerational programs in the greater Portland region.

### • **Planning and convening of the 2016 & 2017 Aging Well conferences:**

The 2016 Aging Well conference was held on October 29, 2016 at Concordia University. Commissioner Nick Fish addressed the audience of approximately 150 attendees, who were mostly older adult “consumers” and others who were there to learn about services, practices and activities that would aid in their healthy and active aging.

The conference program (see Appendix A for full program) was shaped by a call for proposals that yielded 19 speakers who focused their presentations on age-friendly domains that covered topics of housing, health and community services, creativity and aging, and civic engagement. The conference was deemed to be very successful, and in November, 2016, a new committee was formed to begin planning for the 2017 conference (tentatively scheduled for October 21, 2017, at the University of Portland).

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	<ul style="list-style-type: none"> <li> <b>Portland State University’s University Studies’ Capstone course Creating Age-friendly Communities (being offered Spring Term, 2017):</b>            Grant recipient Dr. Alan DeLaTorre has been planning for the course <a href="#">Creating Age-friendly Communities</a> with the Age-friendly Advisory Council and other community partners. The research-based course seeks to improve understanding of physical, social, and service environments and share research findings with local partners in an effort to make the Portland region a better place for those of all ages and abilities. Students will engage in community-based participatory research that has been cultivated through a partnership with the Age-friendly Portland and Multnomah County Advisory Council.             As a result of the November 1, 2016, Encore.org regional convening, one of the two class project areas was identified: a baseline assessment of intergenerational programs in the greater Portland region. Community partners such as Bridge Meadows (an intergenerational living community) and Seniors Advocating for Intergenerational Equity (a nonprofit focused on intergenerational activities) have committed to the project and will be part of key-informant interviews to be conducted with organizational leaders in the community who are attuned to intergenerational programing and activities.         </li> </ul>			
<b>Project Finances</b>	<b>Awarded:</b>	\$98,000.00	<b>Grant Expenditures to Date:</b>	\$20,828.95
<b>Next Steps</b>	<p>Here are the next steps for Portland’s Age-friendly initiative:</p> <ol style="list-style-type: none"> <li>(1) Begin work on redesigning the existing website (a vendor was selected in early 2017) in order to improve age-friendly communication and information for the community</li> <li>(2) Create an age-friendly housing planning matrix aimed to improve the age friendliness of Portland’s housing stock with City and community partners. This includes hosting workshops in late winter/early spring with community partners and stakeholders.</li> <li>(3) Continue to draft changes to the action areas of the Action Plan for an Age-Friendly Portland and develop a strategy for updating the Action Plan in 2017-18</li> <li>(4) Plan for and convene the 2017 Aging Well conference (tentative date is 10/21/17)</li> <li>(5) Continue to collaborate with Portland State University faculty and community partners to prepare for the Spring Term (2017) PSU Capstone course Creating Age-friendly Communities.</li> <li>(6) Complete the 2016 annual progress report to City Council in March, 2017</li> <li>(7) Continue to advance the contributions of older Portlanders and move toward understanding intergenerational programs in the greater Portland areas and building intergenerational partnerships.</li> </ol>			

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**Certification:** By signing this report, I certify that it is true, complete, and accurate to the best of my knowledge.  
*Typed or printed name and title:*

Alan DeLaTorre, Research Associate, Portland State University.

**Signature:**



**Date: February 28, 2017**

*Telephone:* 503.725.5134

*Email Address:* [aland@pdx.edu](mailto:aland@pdx.edu)

*Date report submitted (month, day, year):* February 28, 2017

Appendix A – Final Program for 2016 Aging Well Conference

**Aging Well Conference – Building a Community for All Ages**  
**October 29, 2016, 10:00 a.m. – 3:00 p.m.**  
**Concordia University, Portland, OR**

<b>9:00am</b> –10:00am	<b>Registration</b>	Luther Hall
<b>10:00am</b> –10:25am	<b>Opening remarks</b> <ul style="list-style-type: none"><li>• Conference Chair – <i>Gary Marschke</i></li><li>• AARP Oregon – <i>Elaine Frisen-Strang</i></li><li>• Multnomah County – <i>Liesl Wendt</i></li><li>• City of Portland – <i>Commissioner Nick Fish</i></li></ul>	Luther Hall Auditorium L 121
<b>10:30am</b> –11:15am	<b>Plenary session</b> <b>Keynote:</b> <i>Ashton Applewhite (introduction Jeanette Leardi)</i>	Luther Hall Auditorium L 121
<b>11:30am</b> –12:30pm	<b>Concurrent breakout sessions:</b>  <b>A: Aging Mastery Program® – An Approach to Aging Well</b> <i>Ann Adrian, Maria Bigelow &amp; Barb Blum</i> AMP® is an approach to living that celebrates the gift of longevity. A combination of goal-setting, daily practices, and peer support helps participants make meaningful changes in their lives, aligning with the goal of self-sufficiency and purposeful change.  <b>B: Exploring Age Bias – An Interactive Discussion</b> <i>Ashton Applewhite, Jeanette Leardi &amp; Roger Anunsen</i> What does age bias look like? Why does it happen? What should/can we do about it?  <b>C: Take the Right Steps</b> <i>Simone Carter</i> Have issues with or questions about medication side effects, poor vision, poor balance, difficulty walking? Want to recognize hidden home hazards? Learn how to reduce falls and live better and longer lives.  <b>D: Wellness and Aging: A Balanced Journey</b> <i>Kelli Iranshad &amp; Katy Danforth</i> Are you feeling adrift? Could your life be out of balance? Let two occupational	GRW 312  L 121/L 118  GRW 108  GRW 301

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therapists specializing in productive aging help you identify challenges and strengths.

### **E: Addressing the Unique Needs of Aging LGBT People**

GRW 201

*Multnomah County Aging, Disability, and Veterans Services Division and Friendly House*

This interactive session will feature a World Café-style opportunity to learn about the unique challenges facing aging LGBT people and explore solutions and innovations to build upon the inherent strengths found in the community.

### **F: An Age-friendly Multnomah County**

GRW 310

*Rebecca Miller & Alan DeLaTorre*

What is “Age Friendly” and how does/will it impact your quality of life? Why is it necessary? Come learn about Countywide efforts, use an equity empowerment lens to understand age-friendly issues, and provide input in identifying and measuring outcomes and next steps.

### **G: Community Health Workers: Person-centered Age-friendly Health Services**

L 220

*Edna Nyamu & Suzanne Hansche*

What is a Community Health Worker (CHW) and how do you get yourself one? Learn from a panel of CHWs how it all works and how you can benefit while offering suggestions for services to help you and your family age in place.

### **H: What Happened? Using Oregon’s Early Discussion and Resolution Program to Talk with your Provider When Healthcare Did Not Go as Planned**

GRW 203

*Melissa Parkerton & Beth Kaye*

The program will empower participants to ask healthcare providers for acknowledgement of their experience, answers to their questions about the care they – or their family members – received, and support following serious injury or death from healthcare. It will also empower participants to promote changes to improve care for future patients.

### **J: Renew! Relaunch! Retire! Re-define your Life with a Purposeful Plan**

GRW 120

*Laura Rose-Lewis, Julie O’Leary, Nancy Frisch & Kim Rosenberg*

(Re)discover your personal power at any age through a guided process that helps you renew your life purpose, reconsider what retirement means, explore possibilities for life in later years, and (re)discover creative potential while you renew ideas about age and aging!

12:30pm

Lunch (boxed)

Luther Hall

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-1:25pm

Auditorium  
L 121

1:30pm

-2:30pm

### Concurrent breakout sessions:

#### **AA: Artful Aging: Storytelling as Engagement**

GRW 108

*Tim Carpenter*

Our stories shape our lives. Participants will create, share, and critique their stories using the EngAGE model.

#### **BB: End Ageism: Be Part of the Solution**

GRW 310

*Mike Faber, Roger Anunsen, Julie Concannon, Melissa Bierman & Jan Abushakrah*

Workshop guides participants through an interactive, exploratory process to identify their own ageism, embrace creative potential, connect with the restorative/rejuvenating influence of nature, define their roles as change agents, and identify ways to end ageism.

#### **CC: Civic Engagement: Strategies for Volunteerism and Advocacy in Portland**

GRW 120

*Steve Higgs*

What will your legacy be? How can you be engaged and make a difference in issue areas that are important to YOU and future generations?

#### **DD: Safe at Home: A Reality Show**

GRW 303

*Howard Johnson & Sharon Johnson*

A vivid, real-world demonstration of the undisputed effectiveness of in-home fall risk assessments when coupled with person-centered home modifications.

#### **EE: Disrupting Ageism: Turning Awareness into Action**

L 121/L 118

*Jeanette Leardi & Ashton Applewhite*

Learn to identify ageist thoughts, language, and behaviors in everyday situations as well as effective strategies for dealing with them.

#### **FF: Finding Resources and Supports for Yourself or a Loved One**

GRW 203

*Multnomah County Aging, Disability, and Veterans Services Division Program Experts*

This panel provides an overview of existing services such as the Family Caregiver Support Program, the Veterans Services Program, and the Aging and Disability Resource Connection Helpline. There will be ample opportunity to ask questions.

#### **GG: Encore Entrepreneurship: Self-employment as a Key to Retirement Safety**

GRW 312

*Jackie B. Peterson*

Downsized, outsourced, semi-retired, looking for opportunity? PCC's Encore

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Entrepreneurship helps people over 50 explore, imagine, and discover what excites them, and helps them turn that passion into a self-employment career.

### **HH: OpenNotes: The Power of Knowing**

GRW 301

*John Santa & Naomi Kaufman-Price*

OpenNotes is a national movement working to give patients access to clinician notes. Learn how to gain access and give feedback on the system that makes that available.

### **II: Movement for Health – Movement to Heal**

L 220

*Caz Thomson*

Understand and experience how and why movement can make us feel better - not only in the gym setting, but in our everyday lives. Learn to calm the mind by staying in the moment, and start to treat our body as our home.

### **JJ: The Healing Power of People**

GRW 201

*Peter Walsh*

Having a HUMAN social network is not just a “nice to have,” but a “must have” for continued health and longevity. In this interactive workshop, participants will learn about the surprising, yet proven health benefits of social connection.

**2:30pm**  
–3:00pm

### **Closing session –**

### **Audience Polling & Forum Toward a Community for All Ages**

*Alan DeLaTorre & Gary Marschke*

Luther Hall  
Auditorium  
L 121