Special Appropriations Grant

Progress Report

*Reporting Period: July 1 – April 30, 2019

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

GRANTEE Organization Name	**PSU College of Urban and Public Affairs, Institute on Aging**
Project Title	Age-Friendly Initiative
City Program Area**	Community Health

Overall Project Status »

Project Summary	In 2013, Portland City Council unanimously adopted the Action Plan for an Age-Friendly Portland in an effort to make Portland more age friendly and continue shaping 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 & Employment, Health Services & Equity, Housing, and Transportation). Portland State University (PSU)'s Institute on Aging (IOA) carries out coordination for the Advisory Council and Committees (i.e., it serve as the "backbone" organization for the initiative, as well as implement strategic areas of the Action Plan). Specific activities carried out under this grant include: 1. **Aging Well Conference**: Convene the 2018 Aging Well Conference and mobilize community members from past conferences to move our community toward increased age friendliness. 2. **Age equity**: Investigate how age equity is advanced through the initiative and how it intersects with a racial equity lens. 3. **Consultation with City Bureaus/Offices/Commissions/partners**: Consult with City bureaus to advise on best practices to advance accessible housing and environments, improve service delivery, and achieve more inclusive public engagement. 4. **Civic involvement/knowledge of aging well**: Increase opportunities for enhancing residents' knowledge of how to age well and become more involved civically through advocacy and volunteering.

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

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	5. **Housing visitability**: Advance "visitability" standards through research to estimate the marginal costs of implementing visitable elements and work with City Bureaus to adopt housing accessibility best practices. 6. **Age-smart/age-friendly employer awards**: Create an annual age-smart/age-friendly employer award to advance age-friendly employment and business practices.
Successes	The Age-Friendly Portland initiative is known nationally and internationally as one of the longest running and most innovative age-friendly programs. The local initiative has been at the forefront of the global and U.S. age-friendly movement and been able to advance an Action Plan to move Portland toward becoming more age-friendly, as well as collaborating with myriad partners. The grant has enabled the initiative to accomplish many important goals, including: (1) Offering the 2018 Aging Well conference in a manner that focused on aging, health, diversity, and resilience. The conference will not be offered in 2019, but is expected to return in 2020; (2) better understanding the concept of age equity and developing partnerships that will ensure opportunities to improve the lives and well-being of older Portland, regardless of their age, ability, income level or other characteristic; (3) working closely with City Bureaus, Commissions, and other partners. It should be noted that the City of Portland staff are becoming more familiar with concepts pertaining to age and ability and are integrating age- and ability-related perspectives into their work; (4) civic engagement has improved as a result of the age-friendly initiative in the form of increased public testimony, volunteering activities, and knowledge and input into citywide policies and processes; (5) concepts, knowledge and approaches to housing visitability are being advanced by the Residential Infill and Better Housing by Design Projects. Additionally, work with the Portland Housing Bureau should lead to more accessible multifamily housing; and (6) our first Age-Smart and Age-Friendly Employer Awards were a success. Although there will not be an awards process in 2019, it is expected to return in 2020. Also, of great importance, the City of Portland has passed a budget that includes a new Age-Friendly City Government position within the Bureau of Planning and Sustainability. This is an opportunity to strengthen and advance the initiative.
Challenges	Many challenges exist with respect to the age-friendly initiative in Portland and Multnomah County, including: • Finding ways to revive the Aging Well Conference and Age-Smart and Age-Friendly Business Awards in 2020. • Continuing to understand concepts pertaining to civic engagement and how the wider initiative can increase community involvement, especially from those groups that have been historically disenfranchised and/or unable to participate. • Advancing equity by improving knowledge, trust, and partnerships with communities of color, the disability community, and others. It is important that

we understand the age-friendly variations that differ by race, ethnicity, and other individual and group characteristics. A look at Multnomah County's equity-based considerations provide an important starting point.

- Advancing an age-friendly lens through City Bureaus and among City staff. Although progress has been made, more work is needed, from areas including intergenerational programs, economic development, homelessness, housing options, climate change, healthy neighborhoods, and more.
- Overcoming barriers related to housing accessibility. In particular, state building codes and trade associations present challenges.
- Filling the gap of aging-related organizations that have closed their doors this year, including regional organizations such as Elders in Action, the Age Wise Institute, and the Aging Artfully Initiative.
- The age-friendly website must be purchased after the closing of Elders in Action. The website serves as a starting point for all things age friendly, including support the Advisory Council and Committees, and providing information about research, engagement, and other relevant information.
- Moving beyond an age-friendly pilot project and securing a long-term commitment to making Portland age friendly. This will require both the Bureau of Planning and Sustainability and the City of Portland to be strategic and forward thinking with respect to the Age-Friendly City Government position that is expect to be hired in summer, 2019.

Project Narrative	The following project narrative summarizes activities that were completed as a part of this grant. Attached to this report are appendices that provider further details on projects, subcontracts, etc.
	
	1. **Aging Well Conference**:
	   a. Every month-2 weeks from January, 2018-October 20, 2018, the planning committee (Co-chaired by Alan DeLaTorre and Rebecca Miller) met to coordinate the 2018 conference titled "Diversity & Resilience: Building a Community for All Ages."
	   b. The Conference was held on October 20, 2018 at Reynolds High School; approximately 250+ attendees (approximately 150 older adults and 100 vendors/presenters/volunteers) – see Appendix A for program.
	   c. The Keynote speaker, Dr. Fernando Torres-Gil, M.S.W., Ph.D. was the first Assistant Secretary for Aging for the Administration on Aging within the U.S. Department of Health and Human Services. He was a three time appointee under Presidents Carter, Clinton, and Obama. Currently, Dr. Torres-Gil sits on the National Council on Disability, is the Director of the UCLA Center for Policy Research on Aging, and is a member of the national AARP Board of Directors.
	   d. Due to transitions in Multnomah County and a new age-friendly position in the City of Portland expected to be hired in summer, 2019, there will be no Aging Well conference scheduled in 2019 and the event will resume, pending support, in 2020.

2. **Age equity**:
    a. The Advisory Council for an Age-Friendly Portland and Multnomah county began investigating how age equity could be advanced through the initiative and how it intersects with a racial equity lens, as well as equity issues pertaining to disability and other arenas (see Table 1).

Table 1: 2012-2016 American Community Survey 5-year Estimates of Disability Characteristics – City of Portland			
	Portland city, Oregon		
	Total - 2016	W/ disability 2016	% disability 2016
Subject	Estimate	Estimate	Estimate
Total civilian noninstitutionalized population	635,145	79,275	12.48%
Male	314,000	38,166	12.15%
Female	321,145	41,109	12.80%
White alone	494,733	60,547	12.24%
Black or African American alone	38,203	7,033	18.41%
American Indian and Alaska Native alone	3,461	891	25.74%
Asian alone	49,170	4,576	9.31%
White alone, not Hispanic or Latino	447,271	54,943	12.28%
Hispanic or Latino (of any race)	64,673	7,821	12.09%
18 to 34 years	178,198	14,383	8.07%
35 to 64 years	262,736	31,769	12.09%
65 to 74 years	48,463	12,946	26.71%
65 years and over	77,676	28,484	36.67%
75 years and over	29,213	15,538	53.19%

    b. Observations from existing data highlight two important age equity trends: (1) Black and Native American populations face disproportionate issues with respect to disability; and (2) there is a positive correlation between age and disability in Portland with more than a third of those aged 65+ living with one or more disabilities and more than half of those aged 75+ living with one or more disabilities.
    c. The decision was made to focus on age equity internally to the age-friendly initiative in 2018 before working with government and community partners to advance age equity and the intersections between age, disability, race/ethnicity, and other equity-based issues (e.g., LGBTQ); 2019-20 Special Appropriations funding was secured to write a report titled "The State of Aging in Portland: 2019."
    d. On March 13, 2019, a 2018 annual report was delivered to Portland City Council that highlighted the age equity intersectional perspective and highlighted that the region will see a diversifying population through 2060 as the proportions of Asian & Pacific Islanders, Black, Latinx, & Native American populations will grow, as the proportion of White populations will decline; by 2060 it is expected that 57.1% of the region will be White, down from 77.8% in 2010.

   e. April 5, 2019: Age-Friendly Portland collaborated with AARP Oregon (lead sponsor and planner) to host Dr. Erwin Tam, AARP Director of Thought Leadership, for a presentation titled Disrupt Aging: Implications of Living 100. A response panel with the following people added to the dialog around longevity, equity, and aging: Raahi Reddy (Director of Diversity, Equity and Inclusion Program, Metro); Maria Caballero Rubio (Executive Director, Centro Cultural of Washington County); Coi Vu (Director of Asian Family Center, Immigrant and Refugee Community Organization); Asena Lawrence (Policy Director, Office of Commissioner Nick Fish, City of Portland); and moderated by Alan Delatorre, PSU Institute on Aging.

   f. During the month May, 2019, PSU IOA hired an undergraduate student, Grace Tumwebaze, to work with Commissioner Fish's Age-friendly liaisons to do an environmental scan of equity-focused organizations to ascertain whether they have focused on aging or disability in the past, and/or whether opportunities exist for future age-based equity work (or equity efforts that intersect with age) – See Appendix B – Understanding and Advancing Age Equity.

3. **Consultation with City Bureaus/Offices/Commissions/partners**:
   a. Throughout the two+ years that this project has been executed, members of the Advisory Council for an Age-Friendly Portland and Multnomah County have consulted with various bureaus and offices in the City of Portland, as well as City Commission and other partners.
   b. Appendix C provides a list of City of Portland Bureaus and Offices relevant to the age-friendly initiative.
   c. Appendix D highlights all consultation activities carried under during the grant period, including the no-cost extension period until April 30, 2019.

4. **Civic involvement/knowledge of aging well**:
   a. Members of the public and community partners were invited to an event titled *A Toast to 10 years of Age-friendly Portland* at the Hollywood Senior Center on October 3, 2017. The event offered information about the 10-year history of the local age-friendly efforts, opportunities for networking, and details about future age-friendly events and opportunities.
   b. In the evaluation of the 2017 Aging Well Conference, approximately 65% of attendees expressed interest in future age-friendly involvement. Those individuals were invited to an age-friendly strategic planning event in January, 2018 and have also been offered opportunities to join age-friendly committees.
   c. A presentation at the Build Small, Live Large titled *ADUs as Age-friendly Housing* was given on November 3, 2017 by Alan DeLaTorre, Bandana Shrestha (members of the Advisory Council), along with staff from the Bureau of Planning and Sustainability, an older adults and a ADU developer.
   d. Beginning in November, 2017, Alan DeLaTorre began working with a student from Western Oregon University to develop a database of Age-friendly volunteering opportunities for the Age-friendly Portland

website; those opportunities will be posted on the <u>age-friendly website</u> in late spring, 2018 – See Appendix E.

   e. An age-friendly strategic planning event was held with on January 23, 2018, with Advisory Council and Committee Chairs to prepare for a community strategic planning event that was held on January 30, 2018. The event was well attended and has led to new involvement in age-friendly committees and community efforts to advance age friendliness.

   f. March 7, 2018, Alan DeLaTorre and Bandana Shrestha (members of the Advisory Council), planned and hosted a panel presentation for the public with Jana Lynott (AARP national) and local members of the transportation community.

   g. April and May, 2019, Alan DeLaTorre and Bandana Shrestha (members of the Advisory Council) worked with 1,000 Friends of Oregon to offer advice to the community on preparing testimony for the Residential Infill Project. Alan DeLaTorre provided suggestions for framing one's comments and delivering information in a time-limited fashion; he also explained aspects of project-related concepts and terms such as housing options and visitability.

   h. Jennifer Pratt was hired as a subcontractor to understand what age-friendly civic engagement means and what next steps were needed to be successful as a Civic Engagement Committee. Overall, there is a need to better infuse civic engagement into all age-friendly projects and programs and extra attention and focus needed to include communities of colors and underrepresented elders in public and private engagement processes – See Appendix F for final report, completed in December, 2018.

   i. Alan DeLaTorre joined Office of Civic and Community Life code change committee to assist in reshaping the code that offers direction of the Office. His service on the Committee ends in June, 2019.

   j. February 22, 2019: Age-Friendly Portland collaborated with AARP Oregon (lead sponsor and planner) to host an Age-Friendly Transportation Roundtable titled "Meeting the Transportation Needs of Older Adults and People with Disabilities." Professionals and members of the community discussed safe and reliable transportation for older adults and people with disabilities as a critical component of a livable community. The roundtable discussion focused on how our region can best rise to meet the challenges in a time where demand for accessible transportation options is at its highest and continues to grow. Jana Lynott (AARP Public Policy Institute) discussed universal mobility as a service (MAAS).

   k. March 15, 2019: Alan DeLaTorre worked with high school students from Oregon and Washington to plan and offer two workshops on aging (e.g., aging simulation activities), age-friendly communities, and combatting ageism at World Oregon's Youth Forum titled "This is Our World." This intergenerational learning event highlighted the opportunities that exist when we work with and get to know people of different ages and from different generations and cultures.

5. **Housing visitability**:
   a. As a member of the Residential Infill Project Stakeholder Advisory Committee (SAC), Alan DeLaTorre was involved in the project as a

community volunteer from SAC's inception. After receiving a City of Portland Community Health grant, he released a participant observation report (October, 2016) that detailed aspects of the Residential Infill project and how it was addressing issues pertaining to aging and age-friendly housing. With the assistance of students from Portland State University in spring, 2017, a visibility spreadsheet detailing regulatory and incentive-based approaches across the U.S. was developed for Bureau of Planning and Sustainability staff. In September, 2017, Dr. DeLaTorre submitted a Visitability Best Practice report to the Bureau.

b. Alan DeLaTorre provided testimony to Planning and Sustainability Commission, Residential Infill Project – See Appendix G.

c. Alan DeLaTorre provided testimony to the Bureau of Planning and Sustainability, Better Housing by Design project – See Appendix H.

d. During the winter and early spring, 2018, Alan DeLaTorre worked with a student from Portland's Center for Public Interest Design to develop and implement a survey of local designers and developers to better understand the costs associated with designing and developing home to be visitable. Although the study was a pilot project and the findings are considered preliminary and non-generalizable, the summary report does offer some ideas regarding the costs of visitability – See Appendix I.

e. During the spring and summer, 2018, Alan DeLaTorre worked with Leah Brandis (Masters of Public Health student) to develop a white paper titled "Understanding the Social Impacts of Neighborhood and Home Design for Older Adults in Portland, Oregon" – See Appendix J

f. Kate Holmquist and Adam Hostetler completed a report for the Portland Housing Bureau focused on accessible multifamily housing guidelines – See Appendix K

6. **Age-smart/age-friendly employer awards**:

a. Building on, and in consultation with, New York's Age Smart Employer Award,[1] the Age-friendly Portland and Multnomah County's Economy & Employment Committee began the development of Portland's Age-Friendly Business & Age Smart Employer Awards.

b. The event was held at Portland City Hall on October 31, 2018. Mayor Wheeler and Commissioner Fish addressed the audience and were in attendance.

c. The Age-Friendly Business Award was presented to businesses with commitment and demonstrated business practices that best serve older adults in Portland, including:

i. Multnomah County Elections Division
ii. Multnomah County Library

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[1] The Age Smart Employer Award program was adapted from the Age Smart Employer Award program developed by the Robert N. Butler Columbia Aging Center and founded in partnership with the New York Academy of Medicine and funded by the Alfred P. Sloan Foundation.

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iii. Law Offices of Nay & Friedenberg
iv. Portland Nursery
v. Ride Connection
vi. Seniors on the Move
vii. Urban Development Partners
viii. Unitus Community Credit Union
d. The Age-Smart Employer Award recognized businesses with policies and practices that benefit older workers, including:
   i. Adorn Boutique
   ii. MLK Property Management
   iii. New Seasons Market
e. The 2020 version of the award has been temporarily delayed due to the closing of Elders in Action in May, 2019. Although Age-Friendly Portland's Employment and Economy Committee coordinated the event and financial support was offered from the age-friendly initiative, Elders in Action staff did the largest part of the work – recruitment, partnership with the business community, etc. – and a new lead partner and funding is needed in order to continue to awards.

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Project Finances	**Awarded:**	$99,991.00	**Grant Expenditures to Date:**	$89,963.25

Next Steps	The Age-Friendly Portland and Multnomah County initiative will be advanced as Action Plans are approved by resolution by the City of Portland and Multnomah Country. The Advisory Council and Committees will remain external to the City and County and members of those groups will embark on a process of looking at membership and operations, changing structure if needed, and adding new members. Importantly, for Portland, City Council passed a budget for 2019-20 that included funding a "direction to develop" line item from the Bureau of Planning and Sustainability for an Age-Friendly city Government position. The position is a multi-year pilot project that will need additional support in 2020 and beyond. In the short-term, that hire will work with the Advisory Council and Committees, as well as serve as a liaison with Multnomah County, Metro, the State of Oregon, and other partners, collaborators, and community members. Overall, Portland continues to move toward becoming a community for all age, one that facilitates opportunities to grow up and grow old, no matter your background, age, ability, or other characteristics. It is important to note that the Advisory Council for an Age-Friendly Portland and Multnomah County have offered the City of Portland and Bureau of Planning and Sustainability several recommendations with respect to the age-friendly initiative, including (see Appendix L for original memo): • **Maintain Current Structure of Advisory Council**: We strongly suggest the City of Portland (and Multnomah County) allow operations of the Advisory Council for an Age-Friendly Portland and Multnomah County as an advisory body outside of local government. The Advisory Council should be staffed by

the new City of Portland hire (e.g., attend meetings, discuss relevant municipal issues), but membership and coordination of the Council should adhere to the Charter for the Age-Friendly Advisory Council of Portland and Multnomah County.[2] In particular, we suggest the chair of the Advisory Council should be an external chair who is not employed as the City of Portland's Age-Friendly City Government staff person. Furthermore, the Advisory Council will meet in summer, 2019, to discuss current members, "who is missing from the Council," needed changes to the Charter, and next steps with respect to composition and operations of the Advisory Council.

- **Advancing Equity across the Generations**: We understand that using an equity lens in Portland and Multnomah County starts with and utilizes a racial/ethnic lens; also, the Council understands that race, ethnicity, and disability are the core areas of focus for City and County-based equity work. The Advisory Council embraces this approach and suggests that local and state governments consider the intersections between age and other individual and groups characteristics, including, but not limited to: one's race or ethnicity, abilities/ disabilities, socioeconomic status, sexual orientation/identity, geography, and/or gender. Additionally, the Advisory Council suggests the new City Age-Friendly staff person learn about equity approaches from the Bureau of Planning and Sustainability's equity lead, the Office of Equity and Human Rights, and Multnomah County; with respect to Multnomah County, it has set a precedent with respect to equity-based contracting, workforce development, and community needs assessment. Specific attention can and should be given to efforts around public health and community-powered change, SUN Schools, intergenerational and diverse workforce practices, trauma-informed care, and the City-County Joint Office of Homeless Services.

- **Website: agefriendlyportland.org:** In 2016-17 the City of Portland, as part of a Special Appropriations grant, provided seed funding to launch the Age-Friendly Portland and Multnomah County website (agefriendlyportland.org). The website is functional and contains important information about the Advisory Council, Committees, volunteer opportunities, and more. The Advisory Council suggests that the City of Portland consider providing financial support to the operations of the website in order to facilitate external outreach and knowledge pertaining to the age-friendly initiative. Additionally, the Advisory Council suggests that the City should explore the acquisition of the agefriendlyportland.org domain, current owned by Elders in Action.

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[2] Charter for the Advisory Council for an Age-Friendly Portland and Multnomah County. Retrieved from: agefriendlyportland.org/sites/agefriendlyportland.org/files/docs/AFAdvisoryCouncilCharter_8-20-15.pdf.

- **Toward an Age-Friendly Oregon**: On June 3, 2019, Oregon Governor Kate Brown proclaimed the day as Age-Friendly Oregon Day saying that she supports "initiatives and opportunities for communities to engage in the National Network of Age Friendly Cities."[3] The Advisory Council for an Age-Friendly Portland and Multnomah County suggests that the new City of Portland Age-Friendly hire work with the State of Oregon and other Oregon communities to advance an age-friendly state and to consider synergies with Age-Friendly Public Health and Age-Friendly Heath Systems efforts.

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: **June 19, 2019**

Telephone: 503.725.5134

Email Address: aland@pdx.edu

Date report submitted (month, day, year): June 19, 2019

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[3] AARP Oregon (2019). *Governor Declares June 3 Age Friendly Oregon Day.* Retrieved from:
https://states.aarp.org/oregon/governor-declares-june-3-age-friendly-portland-day

CONFERENCE SCHEDULE

8am-2:30pm	**Resource Fair with 30+ Vendors**	Commons
9:00-10:30am	**Welcome & Keynote Presented by AARP**	Multipurpose Room
	Dr. Sharon Meieran, MD, JD, Commissioner, Multnomah County	
	Nick Fish, Commissioner, City of Portland	
	Dr. Danna Diaz, PhD, Superintendent, Reynolds School District	
	Dr. Fernando M. Torres-Gil, MSW, PhD Dr. Torres-Gil, M.S.W., Ph.D. was the first Assistant Secretary for Aging for the Administration on Aging within DHHS. He was a three time presidential appointee under Carter, Clinton, and Obama. Currently, Torres-Gil sits on the National Council on Disability. He is the Director of the UCLA Center for Policy Research on Aging and is a member of the AARP Board of Directors.	
10:30-10:45am	**Break and Resource Fair**	
10:45-11:45am	**Session A Workshops**	
	Building Community for Aging in Place	Room 109
	Elder Advocacy: Best Methods of Raising an Issue at the City, County and State Level	Multipurpose Room
	Emotional Well-Being in Later Life: Practical Tools for Coping with Change	Room 110
	Healthy Home for Healthy Aging with Feng Shui	Room 111
	*Help is Here: Caring for a Family Member with Dementia — and Yourself, too!	Room 112
	Movement Meditation: Unplug and Calm your Mind with an Integrative Movement Practice	Room 113
	Providing Safety and Protection for Older Adults: Understanding Abuse, Neglect, and Self-Neglect	Room 114
11:45am-1:00pm	**Lunch provided by Multnomah County Aging, Disability, & Veterans Services Division**	

* = Español   1

CONFERENCE SCHEDULE

12:15-1:00pm	**Lunctime activity - Dance for Parkinsons, Instructor Lindsay Reich** Dance for Parkinsons will be offering a sample of a seated dance class, highlighting the benefits of dance as an integrated mind-body activity accessible to all people. There will be an opportunity for questions and discussion at the end of the class.	Multipurpose Room
1:15-2:15pm	**Session B Workshops**	
	A Touch of Grey: Music Therapy and Aging Well	Multipurpose Room
	Accessibility in Policy about Equitable Communities	Room 110
	Civic Engagement: Strategies for Volunteerism and Advocacy in Portland	Room 111
	Hospice Care, Resilience and Quality of Life	Room 112
	*Latino Parents 60+ with Teenage Children and the Clash of Culture, Language, & Technology	Room 113
	*Technology & You	Room 109
	Understanding Unique Challenges Facing GLBT Elders	Room 114
2:15-2:30pm	**Break and Resource Fair**	
2:30-3:30pm	**Session C Workshops**	
	*La Importancia y Beneficios De Pertenecer A Un Grupo	Room 109
	Connecting Across Generations for Social Impact	Room 110
	LGBTQ+ Aging: How a Welcoming Safe Social Environment Creates Sense of Belonging and Supports Health	Room 111
	Too Much Stuff! Hoarding Myths, Stigma, and Tools	Room 112
	Transportation Access to Healthcare: A Community Collaboration	Room 113
	What Makes a Community Feel Like Home? Findings from Community Based outreach	Room 114
	*Zumba Dance Class for All Abilities and Levels (Spanish & English)	Multipurpose Room
3:40-4pm	**Town Hall Discussion and Closing Remarks**	Multipurpose Room

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* = Español

PROGRAM DETAILS

10:45-11:45am: Session A Workshops

Building Community for Aging in Place, Room 109
Jin Darney, Eastside Village
Margaret Baldwin, Northeast Village PDX
Marianne LaBarre, Northstar Village
Anjala Ehelebe, Villages NW

Participants will learn how to build on existing sources of support to enable you to age in your own home. Through interactive learning, this workshop will begin with resources that already exist, and explore additional resources and ways in which a community can support older adults' desire to age in place.

Elder Advocacy: Best Methods of Raising an Issue at the City, County and State Level, Multipurpose Room
JoAnn Herrigel, Elders in Action

Our panel will focus on methods and tools for advocating for services, programs and assistance at the city, county and state level. The panel will include Oregon Senator Laurie Monnes Anderson, District 25; Multnomah County Commissioner Lori Stegman, District 4; and City of Troutdale Councilor Larry Morgan, Position 3. They will each address the basic functions and focus of their level of government, tips on how to advocate for policies or services, and concrete ideas for making your voice heard.

Emotional Well-Being in Later Life: Practical Tools for Coping with Change, Room 110
Meghan Marty, PhD, Rose City Geropsychology, LLC

Later life is often accompanied by challenging and changing circumstances, many of which may be unwelcome or unexpected. Older adults have had a lifetime to develop strategies for coping, many of which can be applied to their current or future difficulties. This workshop will help participants to identify coping strategies that remain effective for them, as well as introduce practical coping strategies that can be applied to many different circumstances, with an emphasis on building meaning and purpose that can benefit communities.

Healthy Home for Healthy Aging with Feng Shui, Room 111
Miyoko Fuse, Home Esteem

This workshop discusses how traditional Chinese art and science also known as feng shui is effectively applied to modern American homes and that affects your life. This workshop introduces the principle of feng shui that is a Yin-Yang duality, a natural method of rejuvenating any area of your home to produce harmony and positive communication. Attendees will learn how to create a safe, healthy, and harmonious home by space planning, colors, shapes, and materials that are affordable.

3

PROGRAM DETAILS

10:45–11:45am: Session A Workshops

*Help is Here: Caring for a Family Member with Dementia -- and Yourself, too!, Room 112
Anne P. Hill, JD, Co-Author Help is Here Project books
Itzel Morales, Providence Oregon Senior Health

Attendees will learn what dementia is and what is not dementia. They will learn skills that will help them care for a family member who has dementia. They will learn why it is so important to take care of themselves and a method to do that by creating two teams: one team for the family member who has dementia and another separate team, for themselves, the family caregiver. It's easy for family caregivers to become isolated and so involved with caring for their family member that they forget that it is vital for them to care for themselves.

Movement Meditation: Unplug and Calm your Mind with an Integrative Movement Practice, Room 113
Caz Thomson; Sherwood Regional Family YMCA

Moving Meditation offers an integrative practice to unplug and move in ways to helps us holistically. This practice allows the body to reclaim mobility, flexibility, strength, agility and stability it needs. Participants start with a gentle walk, and check in with how they are feeling. Participants then starts from a seated position and are then guided through a meditation and various gently movements. The class finishes with gently tai chi and closing meditation.

Providing Safety and Protection for Older Adults: Understanding Abuse, Neglect, and Self-Neglect, Room 114
Cindy Schmidt, Adult Protective Services, Multnomah County Aging, Disability, & Veterans Services Division

Participants will get an overview of Adult Protective Services purpose and process related to screening, investigation and intervention. An investigator will talk about signs, symptoms, and red flags for abuse of older adults and persons with disabilities. The workshop will include discussions and case examples of financial exploitation, abuse, neglect, and self neglect.

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PROGRAM DETAILS

1:15-2:15pm: Session B Workshops

A Touch of Grey: Music Therapy and Aging Well, Multipurpose Room
Emilie Wright, MT-BC, Wildwood Creative

Join us for an hour of active music making and learning! Attendees will explore what music therapy is, how it benefits older adults, and how it can carry over into everyday life. We will engage in improvised music making, and end with a collaborative songwriting experience with a focus on mindfulness. You'll walk away with a custom written song, a sense of community, and a toolbox full of ideas for using music in day-to-day living.

Accessibility in Policy about Equitable Communities: Reassessing, Taking Action, Room 110
Allen Hines, Real Choice Initiative
Andrew Riley, Amalgamated Transit Union Local 757

This workshop presents proposed policies to support older adults and people with disabilities in the Age Friendly Portland Action Plan, the Multnomah County Age Friendly Action Plan, and Portland's Comprehensive Plan, alongside challenges informed by research and the lived experience of people with mobility needs who are often on fixed income and live below the poverty line. We then invite participants to consider policies that could fortify the proposed policies and address challenges. Several housing and transit focused scenarios will be discussed and debated in small groups.

Civic Engagement: Strategies for Volunteerism and Advocacy in Portland: SAGE - Senior Advocates for Generational, Room 111
David Michael Smith & Lisa Rome, Senior

Advocates for Generational Equity (S.A.G.E.) Participants will learn about the personal rewards and health benefits of civic engagement and create an action plan to make a difference in the community. Together, we will explore a range of service and advocacy roles for older adults, and participants will clarify which roles fit best based on your skills and interests. We will also brainstorm solutions to barriers to civic engagement, and share resources to help participants engage in meaningful opportunities.

5

PROGRAM DETAILS

1:15-2:15pm: Session B Workshops

Hospice Care, Resilience and Quality of Life, Room 112
Wendy Haile, MA, CVA, Hospice Volunteer Coordinator, Kaiser Permanente Hospice

This workshop will touch on the basics of hospice care, how patients and their loved ones can benefit from hospice services and how hospice and palliative care focus on quality of life rather than quantity of life. Participants will be given a chance to reflect on what quality of life/resilience means to them and develop an understanding of how quality of life can differ from person to person. Participants will be encouraged to articulate their own values to their loved ones and healthcare providers with the goal of receiving the support and care that is most beneficial to them.

*Latino Parents 60+ with Teenage Children and the Clash of Culture, Language, & Technology, Room 113
Ana Muñoz, Latino Network

This workshop will be a safe and healthy conversation about the challenges parents 60+ are facing with their teen children. What is happening in this intergenerational gap between parent vs. teens that is affecting their core family values? Parents and grandparents will take away information about resources and tools that can assist them in finding support.

*Technology & You, Room 109
Carlos Galeana, Multnomah County Library

As we age, technology can become increasingly inaccessible. The buttons are too small and menus are not clear. The participants will learn more about accessibility settings that make technology more accessible to persons of all abilities. For example, we'll explore increasing font sizes on smartphones, and using speech to text features for texting. We will make the presentation interactive and participants will learn about the free technology classes offered at Multnomah County Library.

Understanding Unique Challenges Facing GLBT Elders, Room 114
Max Micozzi and Ruth Szilagyi, Friendly House

Participants will learn about the barriers that GLBT elders are experiencing when accessing health and housing services today. Attendees will have a broader understanding of how historical trauma can play a role in accessing services and engaging with service providers. Attendees will also gain knowledge of how resilient and vibrant this aging cohort is and how "family", plays a role in providing support when there is no where else to turn to or trust.

6

PROGRAM DETAILS

2:30-3:30pm: Session C Workshops

*La Importancia y Beneficios De Pertenecer A Un Grupo, Room 109
Erika Carranza & Xenia Penate, El Programa Hispano Católico

Participants will discuss new ways to identify and use their own strengths so they can have the knowledge that they are valuable to their group and their community. Presenters will lead participants to find a way to be resilient in their day to day, by doing common activities with support. Talking about inspiration, acknowledging how hard it is for everyone to achieve some tasks, and how it gets easier when someone else inspires you. Workshop will be divided into small groups to complete an activity that will illustrate the importance of a caring community.

Connecting Across Generations for Social Impact, Room 110
Judy Applegate Strand, LCSW and Maruška Lynch, Metropolitan Family Service

Participants will discuss compelling evidence of the power of inter-generational connection in addressing social challenges, share what works in motivating community engagement for older adults, and examine the barriers they see to growing this work. Participants will explore emerging trends in the field, and discuss the challenge of building an inter-generational movement that is culturally responsive and meets the needs of an increasingly diverse population.

LGBTQ+ Aging: How a Welcoming Safe Social Environment Creates Sense of Belonging and Supports Health, Room 111
Kathleen M. Sullivan, PhD, Optimal Aging
Scott Taylor Moore, JD, Quest Center for Integrative Health

Age-friendly is a concept that includes both the built and social environment. Unfortunately, LGBTQ+ older adults are often invisible in agency planning; without a seat at the table their needs are overlooked or worse, unknown. Participants will learn about efforts in Oregon to create a coalition that is working collaboratively to provide the research needed to assess the programs and services currently available to LGBTQ+ older adults in Oregon, provide training to providers to care and services and to document the resiliency of these older adults.

7

PROGRAM DETAILS

2:30-3:30pm: Session C Workshops

Too Much Stuff! Hoarding Myths, Stigma, and Tools, Room 112
Jill Williams, MA and Melissa Greeney,

Multnomah County Hoarding Task Force
Our presentation is interactive and educates people on the myths and facts about hoarding disorder. We talk about why people save things and strategies for clearing space. We talk about hoarding vs clutter vs squalor and appropriate interventions for each. We also go over "do's and don'ts" when trying to help a loved one work on the challenges of "too much stuff". This presentation promotes best practices and helps reduce stigma.

Transportation Access to Healthcare: A Community Collaboration, Room 113
Amparo Agosto, Ride Connection
Zainab Kamara, Providence
Eileen Collins, Trimet LIFT

Kamar Haji Mohammed and Abe Moland, Gridworks IC/Ride to Care
This workshop will provide a presentation of current and developing models of transportation to access healthcare. A panel discussion of on-going efforts to coordinate the scheduling of healthcare services with available accessible transportation services in the Mid-Multnomah County area. In addition, the panel will discuss the future of accessible transportation in the region and its effects on access to healthcare with a focus on access, flexibility, and dependability.

8

What Makes a Community Feel Like Home? Findings from Community Based outreach, Room 114
Gayle Palmer, S.A.G.E. Fellow, Centennial Community Association
Jean Trygstad, Riverwest Villages

Presenters will share community members' input provided in response to a survey of East Portland residents, "What Makes a Community Feel Like Home" and from community conversations with older adults about the contributions of elders to society and the barriers to fulfillment. Participants will be encouraged to share their experiences and ideas for elders, adults, and youth to create a better place for all ages.

*Zumba Dance Class for All Abilities and Levels (Spanish & English), Multipurpose Room
Lydia Hernandez and Cristina Lujan

Low impact dance fitness class perfect for beginners of all fitness levels. The design of the class introduces easy-to-follow Zumba* choreography that focuses on balance, range of motion and coordination. We play Latin and other international upbeat music. Prepare to leave empowered and feeling strong. You can also follow the moves sitting on a chair if you prefer.

Resource Fair for Vendors

The Resource Fair is taking place in the Commons from 8am to 2:30 pm. Stop by these vendor tables and check out what they have to offer:

AARP
Alzheimer's Association, Oregon and SW Washington Chapter
City of Portland Regulatory Services - Accessible Service Program
ClearCaptions, LLC
Community Energy Project
Department of Consumer and Business Services
Easter Seals Latino Connection Program
Elders In Action
Friendly House
Goodwill Industries of the Columbia Willamette
Guardian Partners
Hollywood Senior Center
Home Instead Senior Care
Kaiser Hospice Volunteer Program
Latino Network
Long-Term Care Ombudsman Office
Lutheran Community Services Crime Victim Advocacy Program
Metropolitan Family Service
Multnomah County Aging, Disability, and Veterans Services Division
Multnomah County Library
Office of Community Involvement
Oregon Health Equity Alliance (OHEA)
Portland Water Bureau
Providence ElderPlace
Ride Connection
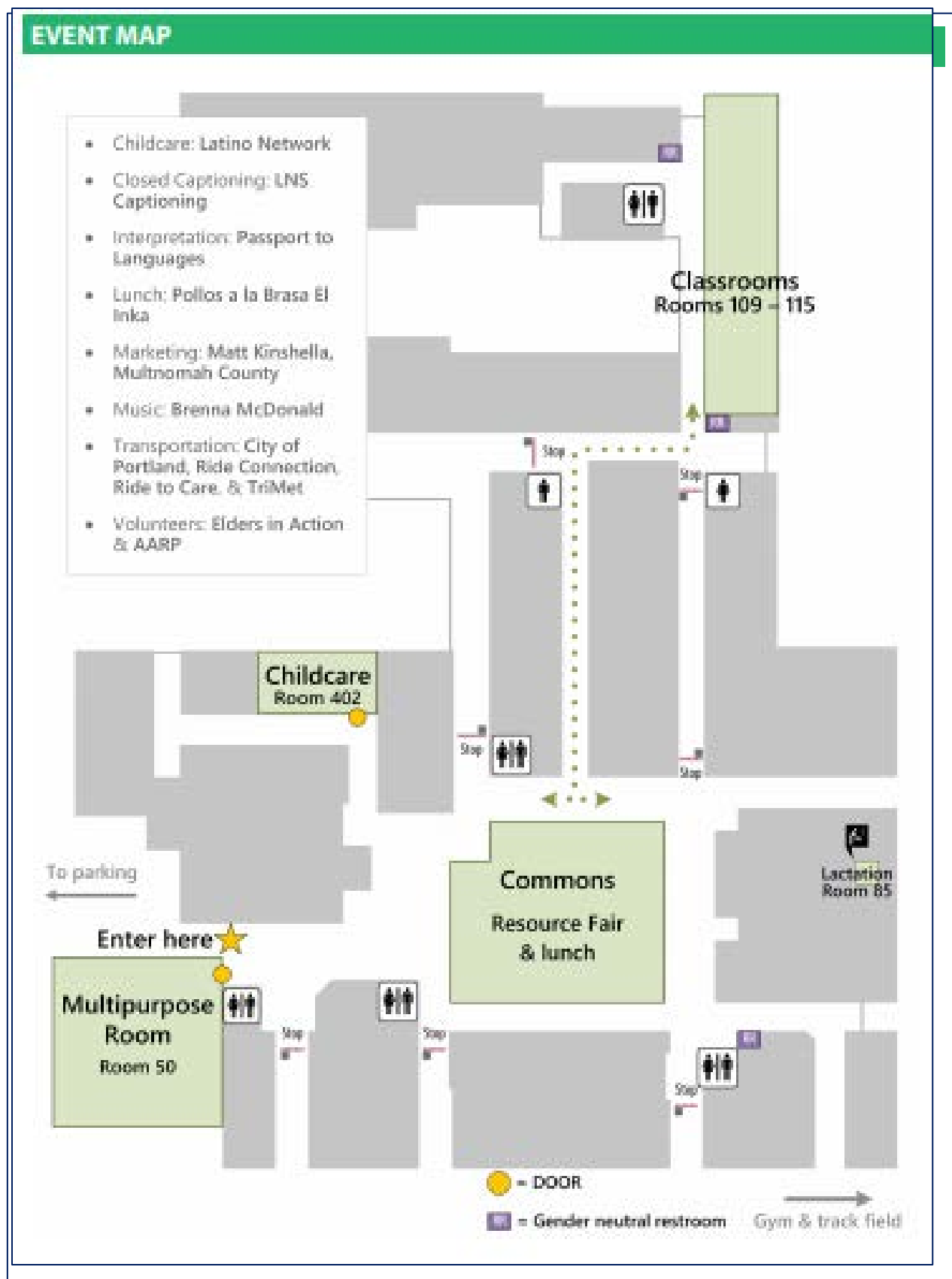Ride to Care
SAGE Metro Portland
Sickle Cell Anemia Foundation, Inc.
Store to Door
Unna, LLC
Urban League of Portland
Villages NW

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EVENT MAP

- Childcare: Latino Network
- Closed Captioning: LNS Captioning
- Interpretation: Passport to Languages
- Lunch: Pollos a la Brasa El Inka
- Marketing: Matt Kinshella, Multnomah County
- Music: Brenna McDonald
- Transportation: City of Portland, Ride Connection, Ride to Care, & TriMet
- Volunteers: Elders in Action & AARP

Classrooms
Rooms 109 – 115

Stop

Stop

Childcare
Room 402

Stop

Stop

Stop

To parking

Commons

Resource Fair & lunch

Lactation Room 85

Enter here

Multipurpose Room
Room 50

Stop

Stop

Stop

= DOOR

= Gender neutral restroom

Gym & track field

Appendix B – Understanding and Advancing Age Equity

May 31, 2019

By: Grace Tumwebaze
Supervisor: Alan DeLaTorre
Consultant: Liaison from Commissioner Fish's office: Asena Lawrence

"Equity is achieved when one's identity cannot predict the outcome"
- [Portland Office of Equity and Human Rights](#)

Justification for Project

Portland State University's (PSU) Institute on Aging (IOA) has been tasked with creating and advancing age equity as part of the ongoing Age-Friendly Portland and Multnomah County initiative. Equity, as defined above, is achieved when one's identity does not predict the outcomes people are experiencing. Age-friendly communities and efforts are inherently equity focused: for example, older adults are a heterogenous group that include people from wide varieties of ages, abilities, races and ethnicities, etc.

In order to advance age equity, Portland must provide resources and tools to members of our communities, no matter where they live in Portland, their age, functional ability, race, or income level. Age equity also means providing appropriate services that meet the needs of older adults, in order to attain high quality of life.

This project sought to better understand the concept of age equity while conducting an environmental scan of nonprofits, government entities, and other community-based organizations that work on equity issues, even when those organizations do not explicitly address older adults.

Appendix A offers details of nonprofits, government entities, and other community-based organizations in the Portland area that have equity in their mission or their programs. Additionally, recommendations to the Advisory Council from an Age-Friendly Portland and Multnomah County, as well as the City of Portland are provided,

Activities Completed

The environmental scan undertaken for the projected looked for current equity-based programs or services. The focus was on organizations that addressed equity, but may not have focused on aging. In order to carry out the project, the following activities were undertaken:

- A undergraduate student, Grace Tumwebaze, in the Community Health program in the joint PSU-OHSU (Oregon Health and Science University) program was hired to conduct the environmental scan.
- The project was guided by Alan DeLaTorre (PSU IOA) and Asena Lawrence (City of Portland, Office of Commissioner Fish); an iterative processes was undertaken where the student met with PSU and City of Portland advisors to learn what organizations should be of focus and gather advice on the final report and appendix.
- The student had one on one meetings, which were once to twice a week with the PSU advisor, reviewing the scan of different organizations that came up, which had equity in their mission, but may not have had an age equity focus.
- Before the scan took place, the student had a conversation with PSU and City of Portland advisors about what equity meant, before looking at age equity, in order to produce an effective internet-based research. The student used the equity definition stated in the link above, to guide with the scan of the different organizations.
- The student and PSU advisor started a google document, which was the main source for recording organizations, found through an internet-based research.
- The weekly meetings mentioned above focused on building onto the google document with any missing pieces, in addition to adding any missing organizations that came to mind. The student would carry on the internet-based research after each week's meeting, with additional notes from the PSU and City of Portland advisors.
- The list of organizations was provided by PSU and City of Portland advisors, which gave the student direction in starting the scanning process.
- Internet-based research
  - Equity language, mission, plans/policies/programs, focus on older adults, people with disabilities.
  - Provide links/references for further exploration
- Write up report

Observations

Throughout the scan, most organizations cover equity in their mission, whether they clearly state it, or use words "like empowering people and/or marginalized groups in society to achieve high quality of life" (Internet-based scan). Most of the organizations believe everyone deserves easy access to resources in order to live a profitable life. However, age equity was not a primary focus for most of them. Organizations that address age equity for example through providing services specifically for older adults,

are organizations one would expect to offer senior programs. For example, organizations that only focus on one specific group like youth, did not cover much about older adults, and older adults with disabilities. Organizations that were broad in who they serve, for example those that focus on serving people of color, members of the LGBTQ+ community,[4] or those that talk about health care clearly address age equity by offering senior programs within their work, even when the organization's initial focus is not on older adults.

A main emphasis is needed, talking about shifting the current definition of equity, to make it more inclusive of older adults and older adults with disabilities, specifically with the organizations that only serve one specific group. Some of the more specific programs in fact offered services that older adults can benefit from like Latino Network which offers the Family Stability Program, which ensures stable, safe and affordable housing for youth and their families. Although specific to youth and their families, older adults can benefit from the Family Stability Program.

The organizations might not be aware that they in fact promote age equity within their work and programs, and therefore a conversation on age equity needs to be had, in order to provide more age friendly programs. Overall, most organizations have some sort of equity work done within their programs and/or services they provide. Most of the organizations however, do not cover age equity, and some required more navigation to be able to track anything that covered aging at all.

Many of the organizations' mission statements covered things that older adults can benefit from, and are therefore considered age friendly because they offer services that are inclusive to older populations. Therefore, even though most organizations did not explicitly state an opportunity to advance age equity, their mission statements and/programs, clearly indicate an opportunity for these organizations to advance age equity within their work, if proactive discussions are had on what it means to be age friendly. In addition, throughout the internet based research scan, some of the organizations talk about equity only in terms of race, but are working to improve more on more on their equity work. With the possibility for organizations to expand on equity work, talking about age equity is possible, and introducing it in their work is probable.

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[4] LGBTQ+ stands for lesbian, gay, bisexual, transgender, and queer/questioning; the "+" indicates any one else who is not included. Note: the LGBTQ+ community uses variations of the acronym, as detailed in the following article: Gold, M. (2018).T*he ABCs of L.G.B.T.Q.I.A.+.* New York Times. Retrieved from: www.nytimes.com/2018/06/21/style/lgbtq-gender-language.html.

On the other hand, organizations that provide aging services offer them separate from all the other programs. Senior services were excluded from the other programs. Other programs for example who were specific to LGBTQ+ individuals also covered people of color, low-income individuals, children and youth, etc. There were not many programs that included both aging and youth programs. Youth, people of color, low-income individuals were more likely to be mentioned in the same program, than seniors and youth. The programs and services for seniors were not only excluded from the rest of the services, senior programs and services offered only reinforced the old patient stereotype, where most aging-services commonly include counseling, chronic disease treatment and other health related issues.

On the other hand, there was not much disability language correlated with aging throughout the organizational scan, except for a few. Cascade AIDS project for example covers resources for older adults living with HIV and AIDS. Other organizations offered services for people with disabilities, but not older people with disabilities. For example, the Office of Equity and Human Rights (OEHR) has a big focus on disability but does not specifically cover older adults with (dis) abilities. There was a lot of language regarding race and ethnicity, LGBTQ+ individuals, children and youth, and only a small portion and/or program on older adults and older people with disabilities.

Recommendations

Throughout the search, a main observation was that most organizations do not offer any aging and/or older adults with disabilities services, because some only serve specific groups like youth only. Those organizations that mostly serve specific groups need to know that the work they do, does benefit older adults and older adults with (dis) abilities, and especially since their work follows an equity lens. Only providing services to specific groups excludes older adults, who have so much to offer, and benefit from these services. Shifting away from organizations that only serve specific individuals, those that offer aging services, offer it separate from other programs, compared to programs that cover both race and LGBTQ+ individuals. In addition to separating these services, the senior programs focus primarily on health and could pose a negative stereotype for the older population. An awareness piece on what it means to be age friendly is missing in the organizations, especially those that only serve one specific group, and is therefore something that needs to be closely looked at.

On the other hand, it is important to note that the services organizations offer are important especially to vulnerable populations. The conversations should not be about limiting these services, rather a way to include older adults and older adults with

disabilities in more than one program. Organizations that offer senior programs are a good incentive for those that do not offer senior services, to look into being age friendly. Since organizations already cover equity in their mission, and include it in their work, the advisory council should talk about shifting looking at equity from a traditional definition standpoint, because it limits older adults from accessing resources in these organizations. In addition, the advisory council and the City of Portland should look at how to encourage organizations to implement trainings that focus on looking at how age friendly environments should look like.

These discussions can also eliminate implicit bias, and provide more inclusivity of older adults and older people with disabilities. Most organizations do not have any services for older adults, but use equity in their mission statements and within their work. Organizations need to look at ways in which to raise awareness, and know that the senior population is important and a great resource in our society. Therefore, expanding on mission statements after the discussions on age equity is a good step to promoting age equity within organizations and is something the advisory council and the City of Portland should look at diligently.

Overall, organizations need to broaden the traditional equity definition, by clearly stating things that promote age equity in their mission statements and/or provide programs that are inclusive to the older population, and are easily accessible. Organizations that offer only a single senior program, separate from other programs limits and puts all older adults in one box. Conversations on how to provide more equitable services needs to had, which starts with talking about equity and how it is defined within organizations. The advisory council, and the City of Portland need to look at organizations that do not already offer aging services, and find ways to raise awareness on the topic of talking about age equity. Organizations that have a specific emphasis on one group like only serving youth, offer services that also benefit older adults and older adults with disabilities, and is something that needs to be emphasized as well. Organizations should also shift away from senior services only being about health, to including seniors in more than one program like community service projects, or involving them in conversations on how to better communities overall.

**Environmental Scan of Portland-based Organizations
with Equity-based Programs or Services:**

Africa House
Geographic coverage: City of Portland

- **Mission**: "To be a leader of community driven, innovative programs delivered by compassionate staff who create equitable services that empower immigrants, refugees and underserved communities": https://irco.org/who-we-are/
- **Plan**: Not clearly stated, but video covers some: https://vimeo.com/132627519
- **Policies and/or Programs**: Africa House Elder garden, Trimet visits African seniors, Africa House's Poverty Alleviation program (see video).
- **Touches on older adults**: See video above: Touches on the issue of senior isolation.
- **Touches on older people with disabilities**: https://vimeo.com/132627519

Asian Health & Services Center
Geographic coverage: Portland metro

- **Mission**: To be the bridge between Asian and American cultures and build a harmonious community.
- **Plan**: Not clear
- **Policies and/or programs**: Under, what we do: https://www.ahscpdx.org/#
- **Touches on older adults**: Under weekly clubs: https://www.ahscpdx.org/weeklyclubs.html,
- **Touches on older adults with disabilities**: Not clear

Asian Pacific American Network of Oregon
Geographic coverage**: Portland, Oregon

- **Mission:** "The Asian Pacific American Network of Oregon (APANO) is a statewide, grassroots organization, uniting Asians and Pacific Islanders to achieve social justice. We use our collective strengths to advance equity through empowering, organizing and advocating with our communities" http://www.apano.org/about/mission-vision-values/
- **Plan**: APANO's strategic plan 2016-2020: www.apano.org/wp-content/uploads/2016/06/APANO-Public-SP-2016-2020.pdf
- **Policies and/or programs**: Under our work: http://www.apano.org/programs/

- **Touches on older adults**: Not clear, but this website covers things that might be beneficial to older adults: http://www.apano.org/programs/jade-district/
- **Touches on older adults with disabilities**: Not clear

CareOregon

Geographic coverage: City of Portland

- **Mission:** "Building individual well-being and community health through partnerships, shared learning and innovation": http://www.careoregon.org/about-us/who-we-are
- **Vision**: "Healthy communities for all individuals, regardless of income or social circumstances". Link same as above
- **Plan: "**The Board of Directors champions and supports a steadfast commitment to **equity**, and diversity and inclusion https://www.careoregon.org/about-us/who-we-are/equity-diversity-inclusion
- **Policies and/or Programs:** Policies and Forms:**www.careoregon.org/providers/support/policies-and-forms**
- **Touches on older adults:** Not specifically indicated, but "provides high quality health care needs for low income Oregonians (OHP is available to adults who earn up to 138 percent of the Federal Poverty Level), including those up to age 64. Something the Older population can benefit from". (Hyperlink) **"**CareOregon ensures that members have timely access to high quality health care from a broad network of providers, and CareOregon works hard every day to keep people healthy and active in their homes and communities": www.careoregon.org/about-us/who-we-are
- **Touches on older people with disabilities:** Does not directly touch on older people with disability. Addresses providing high quality health care needs for vulnerable populations, low income Oregonians. Same link as above.

Cascade AIDS Project

Geographic coverage: City of Portland

- **Mission**: "Support and empower all people with or affected by HIV or AIDS, reduce stigma, and provide the LGBTQ+ community with compassionate healthcare".
- **Plan**: Strategic Plan: http://www.cascadeaids.org/about/strategic-direction/; Strategic Clarity document: http://www.cascadeaids.org/wp-content/uploads/2018/08/CAP-STRATEGIC-CLARITY-ONE-SHEET-FY18.pdf; Health Equity Plan: http://www.cascadeaids.org/wp-

content/uploads/2015/10/Health-Equity-Report-Design-Web.pdf; LGBTQ+ Health Center Business Plan (p. 10): http://www.cascadeaids.org/wp-content/uploads/2016/05/CAP-Business-Plan-0516.pdf.

- **Policies and/or Programs**:
  Health Services: http://www.cascadeaids.org/programs/health-services/,
  Housing Services: http://www.cascadeaids.org/programs/housing-services/,
  Support Groups: http://www.cascadeaids.org/social-support/,
  Get PrEP: http://www.cascadeaids.org/programs/get-prep/,
  Get Tested: http://www.cascadeaids.org/programs/get-tested/,
  Aging Well: https://www.cascadeaids.org/programs/aging-well/
- **Touches on older adults**: Offers a program for older adults- Aging Well: "Our commitment to the well-being of HIV/AIDS long-term survivors and other aging adults living with or affected by HIV":
  https://www.cascadeaids.org/programs/aging-well/.
- **Touches on older adults with disabilities**: Not clearly stated.

Centro Cultural (Washington County)

- **Mission**: A home for Latino cultures, Centro serves the needs of our diverse community by promoting personal growth and empowerment.
- **Plan**: "Equity: We use an equity lens to inform our actions and how we serve the community" https://www.centrocultural.org/about-us.html. Plan not clearly stated
- **Policies and/or Programs**: Programs and services:
  https://www.centrocultural.org/programs.html
- **Touches on older adults**: Senior Program: https://www.centrocultural.org/senior-60-programs.html
- **Touches on older adults with disabilities**: Not clear

Coalition of Communities of Color
Geographic coverage: Portland

- **Mission**: To address the socioeconomic disparities, institutional racism, and inequity of services experienced by our families, children and communities; and to organize our communities for collective action resulting in social change to obtain self-determination, wellness, justice and prosperity.
- **Plan**: http://www.coalitioncommunitiescolor.org/ccc-policyanalysis-advocacy. Toward the bottom, called community and economic development
- **Policies and/or Programs**: Hyperlink leads to different programs, under Bridges.

- **Touches on older adults**: Only through this program
  http://www.coalitioncommunitiescolor.org/bridges-sla-ldp
- **Touches on older adults with disabilities**: Not clear

Community Powered Change

Geographic coverage: Multnomah County

- **Vision**: "Our vision of a healthy Multnomah County is when all people have access to the services that support a person's ability to thrive, no matter what they look like, where they come from, whether they can pay, how they describe themselves, or who they love. Community Powered Change provides pathways to the best health of our communities, acknowledges our histories, empowers us to be our best selves, and creates opportunities for our future generations".
- **Plan**: Community Powered Change Strategies-List: https://www.communitypoweredchange.com/our-five-priorities, https://static1.squarespace.com/static/59fb987cbff200804ad33714/t/5aa309aae4966b175d69503a/1520634374242/Community+Powered+Change+Strategies_List.pdf
- **Policies and/or Programs**: Under implementation: www.communitypoweredchange.com/implementation
- **Touches on older adults**: Not clearly stated, but this website addresses equity within community work: https://www.communitypoweredchange.com/values-guiding-principles-frameworks
- **Touches on older adults with disabilities**: Not clearly stated, website touches on community priorities older adults with disabilities can benefit from: https://www.communitypoweredchange.com/our-five-priorities

Immigrant and Refugee Community Organization (IRCO)

Geographic coverage: Multnomah County

- **Mission**: To promote the integration of refugees, immigrants and the community at large into a self-sufficient, healthy and inclusive multi-ethnic society.
- **Vision**: To be a leader of community driven, innovative programs delivered by compassionate staff who create equitable services that empower immigrants, refugees and underserved communities.
- **Plan**: This hyperlink has different reports that highlight IRCO's strategic plans
- **Policies and/or Programs**: Organization's Policies:https://irco.org/assets/files/financials/policies/Privacy%20Policy.pdf

https://irco.org/assets/files/financials/policies/Policy%20211A%20Participant%20and%20Public%20Complaint%20and%20Inquiry.pdf

Organization's Programs: https://irco.org/what-we-do/

- **Touches on older adults**: Offers senior programs: https://irco.org/what-we-do/seniors/
- **Touches on older adults with disabilities**: Not clear

Latino Network

Geographic coverage: Multnomah County Latinx population

- **Mission:** To positively transform the lives of Latino youth, families, and communities.
- **Vision:** Latino communities are thriving, engaged, and influential.
- **Plan:** Not clear
- **Policies and/or Programs:** Community Healing Initiative (CHI): https://www.latnet.org/chi-overview,Teen Nights: https://www.latnet.org/teen-nights, Youth Microenterprises:https://www.latnet.org/microenterprises-overview, Summer Academia: https://www.latnet.org/academia-overview,Family Stability Programs: https://www.latnet.org/family-stability-overview.
- **Touches on older adults:** Not explicitly, but older adults can benefit from their Family Stability Programs. More on this website: https://www.latnet.org/family-stability-overview
- **Touches on older people with disabilities:** N/A

Metro

Geographic Coverage: Tri-county: Multnomah, Clackamas, Washington Counties

- **Mission:** Metro is committed to inspire, teach and invite people, businesses, nonprofit organizations and public partners to arrive at a Portland region where: All individuals and communities benefit from quality jobs, living wages, a strong economy, stable and affordable housing, safe and reliable transportation, clean air and water, a healthy environment and sustainable resources.
  Metro and other public agencies recognize that racial equity is a cornerstone of good governance to ensure the success of everyone, especially historically marginalized communities, by working together to end the avoidable inequities that prevent the realization of an individual's full potential and are detrimental to us collectively. Public structures, institutions and processes have evolved to address social and economic disparities for people of color that are rooted in our history of

public decision-making. Diversity is celebrated and all communities are meaningfully engaged in public decision-making: Found on website, refer to hyperlink.

- **Plan**: Five Strategic Plan goals: Metro convenes and supports regional partners to advance racial equity, Metro meaningfully engages communities of color, Metro hires, trains and promotes a racially diverse workforce Metro creates safe and welcoming services, programs and destinations, Metro's resource allocation advances racial equity. Found on website in hyperlink.

- **Policies and/or Programs**:
- (P.37):www.oregonmetro.gov/sites/default/files/2017/10/05/Strategic-plan-advance-racial-equity-diversity-inclusion-16087-20160613.pdf
- **Touches on older adults**: Briefly-"Metro's
  Diversity Action Plan, approved by the Metro Council in 2012, will continue to remove barriers for those with low income, people with disabilities, LGBTQ+ communities, women, **older adults** and young people":https://www.oregonmetro.gov/sites/default/files/2017/10/05/Strategic-plan-advance-racial-equity-diversity-inclusion-16087-20160613.pdf
- **Touches on older people with disabilities**: "Metro's Diversity Action Plan, approved by the Metro Council in 2012, will continue to remove barriers for those with low income, **people with disabilities**, LGBTQ+ communities, women, older adults and young people" (same link as above) ~Not explicitly stating older people with disabilities.

Muslim Educational Trust
Geographic coverage: Portland metro

- **Mission**: To enrich the public's understanding of Islam and dispel common myths and stereotypes, while serving the Muslim community's educational, social, and spiritual needs in order to develop generations of proud and committed Muslims who will lead our community to the forefront of bridge building dialogue, faith-based community service, and stewardship of Earth and humanity.
- **Plan**: "Our philosophy is to deliver superb academic and spiritual instruction within an Islamic environment that will nurture our children's hearts and minds and prepare them for their role in life as stewards of Earth and humanity".
  https://www.metpdx.org/index.php/education/ismet-prek-5th

- **Policies and/or Programs**: Under community center, select program:https://www.metpdx.org/index.php/community-center/programs
- **Touches on older adults**: Not clear
- **Touches on older adults with disabilities**: Not clear

Native American Youth & Family Center

Geographic coverage: Portland, Oregon, metropolitan

- **Mission**: To enhance the diverse strengths of our youth and families in partnership with the community through cultural identity and education
- **Plan**: Not clear
- **Policies and/or Programs**: https://nayapdx.org/services/
- **Touches on older adults**: Elder Services: https://nayapdx.org/services/elder-services/, Portland Youth and Elders Council:https://nayapdx.org/community/community-engagement-advocacy/portland-youth-elders-council/, Elders Wall: https://nayapdx.org/community/elders-wall/
- **Touches on older adults with disabilities**: Meals and Food Assistance:https://nayapdx.org/services/elder-services/meals-and-food-assistance/

Office of Community and Civic Life

Geographic coverage: City of Portland

- **Mission**: "Promoting a culture of civic engagement by connecting and supporting all Portlanders working together and with the government to build inclusive, safe and livable neighborhoods and communities": https://www.portlandoregon.gov/civic/28363
- **Plan**: **Inclusive structures**: build inclusion into our daily operations, setting broader change in motion across City government.
  Adaptive governance: seek more ways to collaborate with other City bureaus, bringing the power of our collective resources to achieve shared goals and citywide initiatives.
  Fulfilled and empowered Portlanders: invest resources across a wider range of communities within the city and ensure Portlanders see their experiences, concerns, and aspirations reflected in City-supported programs: https://www.portlandoregon.gov/civic/article/726893 , https://www.portlandoregon.gov/civic/77242

- **Policies and/or programs**: List of programs:
  https://www.portlandoregon.gov/civic/28381
- **Touches on older adults**: "Our programs create a culture of collaboration, expanding possibilities for all Portlanders to contribute their knowledge, experience, and creativity to solve local problems and make life better in the city we all share" Older adults can benefit:
  https://www.portlandoregon.gov/civic/77242.
- **Touches on older people with disabilities**: Only touches on Disability Refugee Awareness Event: https://www.portlandoregon.gov/civic/77689

[Oregon Justice Resource Center](#)

Geographic coverage: Multnomah County

- **Mission:** "To advance civil rights and liberties through advocacy:
  https://ojrc.info/amicus-briefs
- **Plan:** "Work to promote civil rights and improve legal representation for communities that have often been underserved in the past: people living in poverty and people of color among them: https://ojrc.info/about-us.
  "We're now seeing the fruits of our work to identify systemic problems and propose solutions, as policymakers, media, and others adopt our ideas" Fourth paragraph:
  https://static1.squarespace.com/static/524b5617e4b0b106ced5f067/t/5c4217ddbb a223064345fc64/1547835392816/Annual+Report+2018+FINAL.pdf

- **Policies and/or Programs:** Don't explicitly delineate anything age equity. Here are their programs:

  Amicus curiae project, "provides amicus assistance to cases in Oregon that present significant social justice issues related to criminal defense, civil rights, or juvenile justice, or are of particular importance to communities typically underserved by the legal system". https://ojrc.info/amicus-briefs.

  Civil Rights Project (CRP): "The CRP seeks to secure equal and fair treatment individuals intersecting with the criminal legal system, and accountability and

systemic reform through strategic litigation, public education, programming, and policy advocacy". https://ojrc.info/civilrightsproject,

The Immigrant Rights Project: "Provides personalized advice to public defense providers regarding the immigration consequences of pleas and convictions for non-citizens". https://ojrc.info/immigrantrightsproject,

Oregon Innocence Project: "To exonerate the wrongfully convicted, train law students, and promote legal reforms aimed at preventing wrongful convictions". https://ojrc.info/oregon-innocence-project,

Women's Justice Project: "To ensure that the criminal justice system treats women fairly, protects their health and safety, and makes it possible for them to successfully rejoin their communities when they are released", https://ojrc.info/womens-justice-project,

Youth Justice Project: "The Youth Justice Project (YJP) takes a holistic approach to addressing the systemic flaws in Oregon's treatment of youth in the adult system" More on website: https://ojrc.info/youthjusticeproject

- **Touches on older adults:** N/A
- **Touches on older people with disabilities:** N/A

Oregon Health Equity Alliance
Geographic coverage: Tri-County

- **Mission**: "Oregon Health Equity Alliance (OHEA) seeks to remove barriers to health equity through public policy"
- **Plan**: All who participate in OHEA have the goal of advancing health equity
- **Policies and/or Programs**: Not many, but found this campaign for health equity:https://www.oregonhealthequity.org/community-powered-change
- **Touches on older adults**: Not clear
- **Touches on older adults with disabilities**: Not clear

Portland State University Office Global Diversity and Inclusion

Geographic coverage: City of Portland

- **Mission**: "Global Diversity and Inclusion is the central division that leads and facilitates the continuous quest for Inclusive Excellence" (under welcome)
- **Plan:** Diversity Action Plan: https://www.pdx.edu/diversity/diversity-action-plan-0
- **Policies and/or Programs:** Diversity Education and Learning, Student Support and Engagement, Equity and Compliance, Diversity, Equity and Inclusion Advocacy: https://www.pdx.edu/diversity/home
- **Touch on older adults**: Not clear, four pillars above offer services older adults can benefit from
- **Touch on older adults with disabilities**: Not older adults with disabilities, but covers disability: https://www.pdx.edu/accessibility/

Q Center

Geographic coverage: City of Portland

- **Mission**: To provide safe spaces, community building and empowerment for the positive transformation of LGBTQ2SIA+[5] communities and allies in the Pacific Northwest.
- **Plan**: Not clear
- **Policies and/or programs**: Programs at Q Center :https://www.pdxqcenter.org/programs-1
- **Touches on older adults**: Senior Community: https://www.pdxqcenter.org/senior-community
- **Touches on older adults with disabilities**: Not clear

Somali American Council

Geographic coverage: Portland, Oregon

- **Mission**: "To empower the Somali community by enhancing relationships between members of the community and between the community and state wide and/or federal agencies while also promoting cultural expression and diversity".
- **Plan**: Goal is "*to develop and support the coordination and cooperation between various Somali community-based organizations (CBOs) that harness our strengths*

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[5] LGBTQ2SIA+ stands for: Lesbian, gay, bisexual, trans, queer, two-spirit, intersex, asexual or aromantic; the "+" indicates anyone that is not included. Reference: Managing My Health. (n.d.). Retrieved May 15, 2019, from https://www.hamiltonfht.ca/en/Managing-My-Health.aspx.

and also address our needs": http://sacoo.org/about/. "Somali American Council of Oregon (SACOO) aspires to become the umbrella organization for Somali organizations in Oregon as well as a capacity-building think-tank for all matters pertaining to the representation of, or communication with, the Somali community". More info: Key roles, at bottom of the page on this website: http://sacoo.org/about/

- **Policies and/or Programs**: Not clear
- **Touches on older adults**: Not clear
- **Touches on older adults with disabilities**: Not clear

The Office of Equity and Human Rights

Geographic coverage: City of Portland

- **Mission:** The Office of Equity and Human Rights (OEHR) provides education and technical support to City staff and elected officials, leading to recognition and removal of systemic barriers to fair and just distribution of resources, access and opportunity, starting with issues of race and disability: https://www.portlandoregon.gov/oehr/62229
- **Plan**: Bureau Racial Equity Plans- Found in this report: https://www.portlandoregon.gov/oehr/article/627583
- **Policies and/or programs**: Found here: https://www.portlandoregon.gov/oehr/62223
- **Touch on older adults:** Not clear
- **Touches on older people with disabilities**
  - Talks about persons with disabilities, but does not explicitly state older people with disabilities: https://www.portlandoregon.gov/oehr/62222, https://www.portlandoregon.gov/oehr/article/627583

United Way of the Columbia-Willamette

Geographic coverage: Portland, Oregon
- **Mission**: Improve lives, strengthen communities and advance equity by mobilizing the caring power of people across our metro area.
- **Plan**: "We're working hard to create a future where kids in our region are free from instability and worry so they can be free to play and discover, free to learn and grow: https://www.unitedway-pdx.org/about
- **Policies and/or Programs**: Leading with Equity: https://www.unitedway-pdx.org/leading-equity, Other programs: https://www.unitedway-pdx.org/our-work
- **Touches on older adults**: Not clear
- **Touches on older adults with disabilities**: Not clear

Urban League of Portland

Geographic coverage: Oregon, Portland

- **Mission:** To empower African Americans and other Oregonians to achieve equality in education, employment, and economic security.
- **Plan**: Not clear
- **Policies and/or Programs:** We help those we serve to achieve equality in education, **senior services**, health, employment, and economic security. Advocacy and Civic Engagement: https://ulpdx.org/programs/advocacy-and-civic-engagement/, Community Health Worker Program: https://ulpdx.org/programs/community-health-worker-programs/, Healthy Families: https://ulpdx.org/programs/cover-oregon/, Seniors Program: https://ulpdx.org/programs/seniors-program/, Workforce Program: https://ulpdx.org/programs/workforceprogram/, Youth Program: https://ulpdx.org/programs/youth-program/
- **Touches on older adults:** Yes. Offers senior services program: https://ulpdx.org/programs/seniors-program/
- **Touches on older people with disabilities:** N/A

Western States Center

Geographic coverage: Portland

- **Mission:** To connect and build the power of community organizations; to challenge and transform individuals, organizations and systems to achieve racial, gender and economic justice.
- **Plan:** Not clear
- **Policies and/or Programs:** Building Movement, Developing Leaders, Shifting Culture, Defending Democracy: Found in hyperlink
- **Touches on older adults:** Not explicitly. "We envision our movement achieving a just society where we all flourish in sustainable, caring and connected communities: http://westernstates.center/about. Older population can benefit. "Community organizing groups lift the veil and expose discriminatory policies and practices and offer solutions that strive toward equitable outcomes: http://westernstates.center/our-communities
- **Touches on older people with disabilities:** Not clear. Doesn't cover disability at all

Appendix C – List of City of Portland Bureaus and Offices relevant to the age-friendly initiative

Top priority based on Action Plan
- Development Services
- Environmental Services
- Office of Equity and Human Rights
- Parks & Recreation
- Portland Bureau of Emergency Management
- Portland Water Bureau
- Portland Bureau of Transportation
- Portland Housing Bureau
- Planning and Sustainability
- Neighbor Involvement

Relevant
- Auditor's Office (e.g., annual livability survey)
- Fire & Rescue
- Fire & Police Disability & Retirement
- Police Bureau
- Prosper Portland
- Human Resources
- Office of Government Relations
- Office of Management & Finance
- Technology Services
- 911 Bureau of Emergency Communications

To be determined
- Office of the City Attorney
- City Budget Office
- Financial Services
- Internal Business Services
- Procurement Services
- Revenue and Financial Services
- Revenue Division

Appendix D – Consultation Activities with City Bureaus, Commissioners, and other Age-Friendly Partners

- July, 2017:
  - Alan DeLaTorre met with staff from the Portland Housing Bureau and other Bureaus and consulted on age-friendly aspects of Accessory Dwelling Unit (ADU) development.
  - Alan DeLaTorre consulted on new Multnomah County Courthouse regarding accessible/age-friendly design.
  - Alan DeLaTorre communicated with Oregon Harbor of Hope on need to consider age-friendly design of proposed Oregon Harbor of Hope project (homeless shelter and services).
  - Age-friendly Advisory Council members met with delegation from Singapore in Portland to discuss age-friendly initiative and to learn about best practices for serving older adults locally and globally.

- August, 2017
  - Alan DeLaTorre reviewed and commented on Bureau of Planning and Sustainability efforts around visitability (Residential Infill and Better Housing by Design Projects).
  - Alan DeLaTorre met with disability advocates to discuss directions of Residential Infill and Better Housing by Design Projects and how to get involved in public input.

- September, 2017
  - Alan DeLaTorre, Margaret Neal and others from the Advisory Council communicated with U.S. News and provided an age-friendly tour that led to a published article titled _Unusual Housing Options Bloom in Oregon's Rode City_; the article detailed Portland's Age-friendly Initiative.
  - Alan DeLaTorre met with members of the Portland Water Bureau pertaining to a proposed project focused on low-income customers.
  - Alan DeLaTorre met with staff from Commissioner Eudaly's office to brief them on the initiative and discuss priorities and alignment.

- October, 2017
  - Alan DeLaTorre met with Bureau of Planning and Sustainability Director and Chief Planner to discuss age-friendly housing opportunities and challenges.
  - Alan DeLaTorre offered verbal and written testimony regarding the Residential Infill Project preliminary code and map amendments.
  - Alan DeLaTorre met with the Portland Commission on Disability's Accessibility in the Built Environment Committee to consult on how Commissioners could provide public input on the Residential Infill and Better Housing by Design Projects.
  - Alan DeLaTorre consulted with project lead on Portland Water Bureau low-income customer project and met with _ad hoc_ Committee.

- November, 2017
  - Alan DeLaTorre consulted with Alta Planning on ways to improve transportation options for older adults.

- o Alan DeLaTorre attended Metro's Build Small coalition meeting and discussed Bureau of Planning's Residential Infill Project and age-friendly Housing.
  - o Alan DeLaTorre met with the Portland Commission on Disability's Accessibility in the Built Environment Committee to consult on accessible housing and environments, including public input on the Portland Art Museum proposed redevelopment.
  - o Alan DeLaTorre met with members of the Bureau of Planning and Sustainability to develop a strategy for identifying the costs of visitable design and development.

- December, 2017
  - o Alan DeLaTorre met with the Portland Commission on Disability's Accessibility in the Built Environment Committee to consult on accessible housing and environments.
  - o Co-authored 2016-17 Age-friendly Portland report and presented to Portland City Council on December 13, 2017.

- January, 2018
  - o Alan DeLaTorre met with the Portland Commission on Disability's Accessibility in the Built Environment Committee to consult on accessible housing and environments.
  - o Alan DeLaTorre met with Portland Bureau of Transportation staff member to discuss how to measure aging and disability.
  - o Alan DeLaTorre met with Bureau of Planning and Sustainability staff regarding visitability for Residential Infill and Better Housing by Design Projects.

- February, 2018
  - o Alan DeLaTorre consulted with project lead on Portland Water Bureau low-income customer project.
  - o Alan DeLaTorre, Margaret Neal and members of the Advisory Council were interviewed as part of a KBOO radio series titled *Retired?...or Rewired*[6] that discussed Portland's age-friendly efforts.
  - o In consultation with Commissioner Nick Fish's staff, Alan DeLaTorre developed a preliminary list of Portland Bureaus and Office that were relevant to the Age-friendly initiative (see Appendix B).

  - o On February 27, 2018, Alan DeLaTorre, Bandana Shrestha, Cora Potter, Jay Bloom, and Margaret Neal (all members of the Advisory Council), along with Jamie Dunphy from Commissioner Fish's office, coordinated a meeting to discuss age-friendly challenges and opportunities with staff from the following Bureaus/Offices: Equity and Human Rights, Neighborhood Involvement, Parks and Recreation, Planning and Sustainability, Transportation, and Water (see Appendix C for meeting goals and agenda).

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[6] In personal communication with the series host, Tom Flynn, he noted that the series podcasts are not available on KBOO's website as "KBOO's web site was hacked---all the episodes of "Retired?...or ReWired?" were taken down."

- March, 2018
    - Alan DeLaTorre met with the Portland Commission on Disability's Accessibility in the Built Environment Committee to consult on accessible housing and environments.

- April, 2018
    - Members of the Age-Friendly Transportation Committee met to discuss age-friendly suggestions for PedPDX: Portland's Citywide Pedestrian Plan. Although the Committee did not submit testimony, the conversation informed testimony offered by others.

- May, 2018
    - Alan DeLaTorre offered testimony to the Portland Planning and Sustainability Commission, pertaining to the Bureau of Planning and Sustainability's Residential Infill Project.
    - Alan DeLaTorre provided guidance to community members and students interested in offering testimony pertaining to the Residential Infill Project. Advice focused on delivering testimony in a timely and useful manner, and understanding aspects of housing options and visitability.
    - Alan DeLaTorre and Office of Equity and Human Rights staff member Nickole Cheron met with Jamey Duhamel (Commissioner Eudaly's office) to discuss age- and ability-friendly housing.
    - Alan DeLaTorre met with staff from the Office of Equity and Human Rights (Nickole Cheron) and Portland Housing Bureau (Suzanne Zuniga) to discuss the Housing Bureau's interest in improving knowledge of accessible housing safe harbors and best practices.

- June, 2018
    - Alan DeLaTorre offered testimony to the Bureau of Planning and Sustainability pertaining to the Better Housing by Design project.
    - Alan DeLaTorre met with Michael Szporluk, a consultant hired by the Office of Equity and Human Rights, to discuss the intersection between age- and ability-friendly issues.

- August, 2018
    - Members of the Advisory Council for an Age-Friendly Portland met with the Portland of Portland to discuss age-friendly barriers and features of the Portland airport and to inform future design of the airport terminal remodel.
    - Alan DeLaTorre and Kate Holmquist (sub-contractor for the project) met with Suzanne Zuninga from the Portland Housing Bureau to discuss the development of a report focused on accessible multifamily guidelines.

- September, 2018
    - Alan DeLaTorre met with staff from the Bureau of Planning and Sustainability and a member of the Planning and Sustainability Commission to discuss housing visitability and State of Oregon building and land use codes.

- October, 2018
    - Alan DeLaTorre, along with staff from Multnomah County's Aging, Disability, Veterans Services Division, briefed Multnomah County Commissioner Sharon Meieran on the history of the Age-friendly Portland and Multnomah County initiatives.
    - Alan DeLaTorre met with Jonathan Simeone, staff at the Office of Equity and Human Rights, about the opportunities and challenges related to making Portland more age- and ability-friendly.

- November, 2018
    - Alan DeLaTorre met with staff from the Bureau of Planning and Sustainability to discuss potential changes to the Better Housing by Design and Residential Infill Project visitability standards.

- March, 2019
    - Alan DeLaTorre, Ruby Haughton-Pitts, Shanna Pittman-Frank, Leroy Patton, Kathy Moyd, and Judy Strand presented and offered testimony to Portland City Council related to the age-friendly initiative.

- May, 2019
    - Alan DeLaTorre and Margaret Neal, along with Dr. Elizabeth Eckstrom (Oregon Health & Science University) led an Age-Friendly Walking Tour for members of the American Geriatrics Society.
    - Alan DeLaTorre and Adam Davis presented to Portland City Club – moderated by Ruby Haughton-Pitts – for its Friday Forum. The event was titled "How to Build an All-Ages City" and focused on the history of the age-friendly Portland and Multnomah County efforts, as well as challenges and opportunities that lie ahead with respect to older adults, youth, and intergenerational programming.
    - Alan DeLaTorre met with members of the Bureau of Transportation and student from PSU's Masters of Urban and Regional Planning program to discuss design and functions of a Cathedral Park Neighborhood plan. Several age-friendly recommendations were offered.

Appendix E – Volunteering Opportunities Detailed on:
http://agefriendlyportland.org/get-involved/volunteering

There are many volunteering opportunities for people of all ages in and around Portland. Some activities are centered specifically around supporting older adults or fostering intergenerational exchange. Below we have compiled a list of organizations currently offering volunteering activities. Please note that this is not a comprehensive list; for additional information, you can visit volunteering platforms such as Hands on Greater Portland.

AARP Oregon

AARP is a nonprofit, nonpartisan organization with a membership that helps people 50+ have independence, choice and control in ways that are beneficial and affordable to them and society as a whole. Our AARP Oregon state office has over 1,500 volunteers across the state that play a critical role in fulfilling our mission. There are many ways to get involved. To find out about how you can volunteer with our state office, please contact Sarah Bader at sbader@aarp.org.

Albertina's Place

Albertina's Place raises money for Albertina Kerr, empowering people with intellectual and developmental disabilities, mental health challenges, and other social barriers to lead self-determined lives and reach their full potential. We operate a restaurant and three retail shops with volunteers. Opportunities include: cook; host/hostess; server; cashier; sales person; model; inventory specialist; flower arranger; reservationist; pantry. Please visit our volunteering website to learn more.

Boys & Girls Clubs of Portland

Contributing your time is a powerful way to support the youth in your community. We count on volunteers to help us carry out our mission by offering quality programs, creating meaningful relationships, and inspiring young people to reach their full potential. There are many ways to get involved at every level of our organization. We are flexible and strive to match you with an opportunity that fits your skills, interests, and availability. Please visit our volunteering website to learn more.

Cedar Sinai Park and Jewish Family and Child Service

Volunteer opportunities at Cedar Sinai Park include group and one-on-one settings, outings, general support, parties, and special events. Examples of activities include beading, craft club, brain fitness, library organization, restaurants, community events, shopping, cocktail hour, BBQs, trail maintenance, and religious services. With Jewish Family and Child Service, Café Europa is a monthly social event for Holocaust survivors. The primary need is for drivers for the monthly event. Please visit our volunteering website to learn more.

Chess for Success

Volunteering with Chess for Success is a great opportunity to spend time with children in your community. We serve primarily vulnerable children who need good role models. We currently need Chess Club Assistants to work in the clubs with the kids (October-March, many locations) and tournament assistants as needed (January-March). For chess lovers, our clubs are a great opportunity to help the next generation learn and have an appreciation for the game. Or, if you don't play chess, you can learn with the kids!

DoveLewis Emergency Animal Hospital

DoveLewis is the Northwest's nonprofit 24-hour emergency animal hospital. We offer unique programs to the community which strengthen and celebrate the human-animal bond. Volunteer opportunities are available to support our fundraising events and community outreach efforts. We offer many opportunities in the Portland area that are great for people who enjoy engaging with our diverse community. We do not require a time commitment; you can sign up based on your interests and availability. Please visit our volunteering website to learn more.

Dress for Success Oregon

Our mission is to empower women to achieve economic independence by providing a network of support, professional attire, and the development tools to help women thrive in work and in life. Our team of dedicated volunteers helps us achieve our mission through a variety of positions, from shopping with clients to helping them achieve their career goals. We need help in all areas of our work and in return provide meaningful and rewarding volunteering experiences. Please visit our volunteering website to learn more.

Elders in Action

Our volunteer programs, training opportunities and other projects enable older adults and others in the community to find meaningful and vibrant work to benefit the lives of vulnerable older adults. We assist individuals directly or connect them to community resources that can help. Volunteer opportunities include advocating for individuals and on public issues, community education and outreach, age-friendly business evaluation, office assistance, and more. Please visit our volunteering website to learn more.

Financial Beginnings Oregon

The largest of our volunteer opportunities are teaching our programs to youth and adults in the classroom and in the community. Volunteers rely on real issues - saving for college, buying a home, and the ramifications of bad credit - to teach financial principles. Volunteers then guide participants through activities such as making a budget or reviewing credit reports to reinforce those principles. Opportunities include presenting, serving as a financial coach, and administrative support.

Forest Park Conservancy

Volunteers have always been at the heart of Forest Park Conservancy (FPC). From working in the office to removing invasive plants and repairing trails, we could not do our work without the support of hard working, caring people, community groups, and businesses. Each year, FPC recruits and trains 1,500 volunteers who log more than 10,000 hours in Forest Park and help in our office as well as at outreach events. Please visit our volunteering website to learn more.

Friends of Baltimore Woods

We off volunteer opportunities throughout the year that involve removing invasive species, planting native plants and trees, mulching, and other outdoor work. We also have a few events where we need volunteer help with setting up and tearing down, operating cash registers, helping customers, etc. Our whole organization is volunteer run, and anyone is welcome to join to help educate the community, recruit new members, help us fundraise, and offer tours of the woods, to name a few examples. Please visit our volunteering website to learn more.

Friends of Trees

Our flagship volunteer role is as a tree planting volunteer! Tree planters have the option of a wide variety of community work parties on weekends, October through April. We welcome people of all ages and abilities. No previous experience is necessary. Gloves, tools, and guidance are provided, as well as breakfast snacks and coffee/tea. We ask that all volunteers dress to be comfortable working outdoors and wear closed-toe shoes or boots they don't mind getting a little dirty. Please visit our volunteering website to learn more.

Friends of Tryon Creek

Volunteers give over 20,000 hours each year to support education, outreach and stewardship programs at Tryon Creek State Natural Area. Whether guiding hikes, pulling ivy, greeting visitors, or leading school field trips, our volunteer community makes Tryon Creek a unique urban forest. Please visit our volunteering website to learn more.

Guardian Partners

Guardians are appointed by the Court to make decisions on behalf of an individual who is incapacitated. The vast majority of Oregon Guardians are extremely caring and responsible individuals. Even so, every year there are more than 2,900 confirmed cases of abuse against elders and adults with disabilities in Oregon. Volunteer monitors are at the heart of our mission to ensure vulnerable Oregonians are not experiencing abuse or neglect. The information they provide the Judge will be essential in deciding how to best proceed in an effort to ensure the Protected Person is safe and thriving. Each monitor is appointed by the Court to a specific case. They review the file at the Probate Court, visit independently with the Guardian and the Protected Person, and write a report to the Court with their findings. Please visit our volunteering website to learn more.

Habitat for Humanity Portland/Metro East

Habitat for Humanity revitalizes neighborhoods, builds affordable and sustainable homes, and empowers families through successful homeownership. Volunteer on the construction site with Habitat for Humanity and you can learn new skills, make friends, and help Portland families make their dream of homeownership a reality. No experience is necessary to volunteer - we will provide onsite, task-specific training each day. The work may be inside or outside, and takes place all year round, rain or shine. If you don't

mind getting your hands dirty and would like to become part of a superstar crew of volunteers, this is the place. Please visit our volunteering website to learn more.

Hands on Greater Portland

We ask all Hands On Portland (HOP) volunteers to read each opportunity's detailed project description as they vary in task and physical requirement.

Hollywood Senior Center

The Hollywood Senior Center (HSC) is where communities embrace the opportunities and challenges of aging. Volunteer support at HSC enables the Center to fulfill our mission of serving older adults, their caregivers, and the neighboring community through education, information, health and wellness, recreation, nutrition, and social services. Volunteers welcome people to the Center and link individuals to various resources in the community, advocate, work in the gift shop, prepare and serve meals, check on homebound clients, teach classes, and serve on committees.

Jesuit Volunteer EnCorps (JV EnCorps)

JV EnCorps, a program of JVC Northwest, facilitates opportunities for service, community, and spiritual formation for adults 50 and older who are committed to social and ecological justice. During their ten months of part-time volunteer service, participants meet regularly in community to deepen their spirituality and reflect on their volunteering. JV EnCorps assists the program participants in finding a volunteer placement in a local nonprofit that fits their skills and passion.

Kaiser Permanente Hospice Volunteer Program

Kaiser Permanente Hospice provides support to families and patients as they experience a terminal illness. Volunteers (age 21 or older) play a vital role in caring for Kaiser Hospice patients and their families. As valued members of the hospice team, volunteers can make a difference by providing a break for a family caregiver or visiting patients in care homes and facilities. Please visit our volunteering website to learn more.

Living Yoga

Living Yoga offers trained volunteers the opportunity to teach trauma-informed yoga classes at 24 partner sites around the Portland-metro area. We ask that our volunteer

teachers have three years of yoga experience and attend our trauma-informed training before offering yoga to vulnerable and marginalized populations. We are also looking for volunteers to serve as Board members, and in office/event support roles. Please visit our volunteering website to learn more.

Meals on Wheels People

Meals on Wheels People relies on more than 400 volunteers every weekday to serve meals in dozens of neighborhood senior dining centers and to deliver Meals on Wheels to homebound elderly throughout the Portland-Vancouver metro area. Meals can be delivered using a car or a bike. In addition, we have limited walking routes in downtown Portland. We can also use groups of volunteers in our Central Kitchen in Multnomah Village on weekdays and for special events throughout the year.

Metropolitan Family Service

AARP Foundation Experience Corps is a national program that taps into the experience and passion of adults age 50+ to ensure that every child has a chance to succeed in school. Volunteers age 50+ are tutors and mentors for kids in kindergarten through third grade. Volunteer drivers with Project Linkage can help provide free rides to appointments, grocery shopping, and other engagements that help older adults stay independent and connected to their community. Please visit our volunteering website to learn more.

Multnomah County - Department of County Human Services

The unpaid volunteer and internship programs at Multnomah County's Department of County Human Services offer exposure to the complexities, daily operational and service needs of the various programs and diversity of clients served. Entry level positions offer opportunities to develop or strengthen each person's abilities in areas such as: customer service, computers, problem solving, and gaining an understanding of customer needs and barriers developing insight into the opportunities and challenges of public service systems. Please visit our volunteering website to learn more.

Multnomah County - Aging, Disability & Veterans Services

Our primary goal is to help elders and adults with disabilities live as independently as possible. We provide a range of services - some directly and others under contract with community agencies - to achieve that end. We use volunteers on a limited basis for

several programs, such as SHIBA, Oregon Money Management Program, Public Guardian, Foster Grandparent program, Evidence-Based Health Promotion, advocacy, and more.

New Avenues for Youth

Volunteer opportunities at New Avenues for Youth include preparing and serving meals in our Drop-In Day Services Center, collaborating with youth through art and music in our Artist Mentorship Program, tutoring in GED subjects in our alternative education program, supporting youth in our Sexual and Gender Minority Youth Resource Center, helping youth with career preparation and mentoring in our PAVE (Promoting Avenues to Employment) program, and volunteering at our fundraising events. Please visit our volunteering website to learn more.

Oregon Food Bank

About 1,500 volunteers donate their time at Oregon Food Bank each week! Food repack volunteers help with the most fundamental part of our mission – getting food to the people who need it most. Many food donations need sorting, repacking, labeling or additional processing before they are ready to be sent to hunger-relief agencies. Help us prepare food to be distributed through our network to hungry families. Please visit our volunteering website to learn more.

Oregon Maritime Museum

Volunteers at Oregon Maritime Museum share the stories of the working river. Whether or not you are a history buff, you will catch the volunteer bug when you become a volunteer docent and lead tours of the Steamer PORTLAND, the only full restored steam sternwheel ship assist tug in the US. If quieter work suits you, you can volunteer to review archives or do general office work. We train newcomers, and schedules are flexible. Please visit our volunteering website to learn more.

Oregon Office of the Long-Term Care Ombudsman

The Oregon Ombudsman program is an independent state agency that serves long-term care facility residents through complaint investigation, resolution, and advocacy for improvement in resident care. Our certified volunteers are official representatives of the Ombudsman Program. They attend an initial training and work closely with State Ombudsman staff to advocate for and protect the rights of residents who are aging and disabled living in long-term care facilities.

Passport Oregon

Our volunteer opportunities are to attend outdoor nature/hiking trips with our youngest generation that lack the opportunity or ability to get out into Oregon's outdoors. Volunteers attend the trip, help drive the van, mentor and be a friend to the kids, help lead hikes/activities, encourage environmental exploration and education, and help the kids explore. Please visit our volunteering website to learn more.

Portland Tennis & Education

Portland Tennis & Education volunteers spend time both on the tennis court and in the classroom with the scholar athletes and coach/tutors. Volunteers engage in activities with underserved youth, who are experiencing a variety of struggles at home and school. They provide homework support and educational enrichment, as well as exercise and life skills. Volunteers are coaches, tutors, and role models. Our volunteers commit to a consistent schedule. Please visit our volunteering website to learn more.

Project Lemonade

Project Lemonade operates a retail "store" that provides foster youth a free clothes shopping experience. We have a small staff and our 750 annual volunteers are integral to the operations of our store. Volunteers participate in all aspect of the store from sorting donations, inventory management, stocking and organizing the store, and interacting with foster youth shoppers during shopping events.

ReFIT: Remodeling for Independence Together

We are dedicated to helping people struggling with the aging process to live independent lives… at home. By providing essential modification services such as access ramps, bathroom modifications, widening doorways and installing grab bars, we help homeowners who want to stay in their homes but lack the resources to make necessary changes. We have volunteer opportunities for skilled construction workers for projects and needs in event planning, fundraising, and finance. Watch this 5-minute YouTube video to learn more.

Ronald McDonald House Charities

Our Houses are built on the simple idea that nothing else should matter when a family is focused on the health of their child - not where they will get their next meal or where

they will sleep. Our volunteers remove the stress of everyday life by keeping our Houses beautiful, our kitchens full, and our children entertained. Volunteering with RMHC is an enriching experience not only for our volunteers, but for the thousands of families who walk through our doors. Please visit our volunteering website to learn more.

SAGE - Senior Advocates for Generational Equity

We engage older adults in causes and nonprofit programs that benefit children and youth. If you're not sure where to get involved, contact us to meet for coffee or tea. During our meeting, you tell us what you care about and how you want to make a difference. We match your goals and interests with the activity that's right for you. The best fit may be with one of our partners or with SAGE. Our opportunities range from greeting people at events to hosting a discussion group to special projects. Please visit our volunteering website to learn more.

Sisters of the Road

Volunteers at Sisters of the Road most often support our daily (Tue-Sat) Cafe operations serving the people of Portland's Old Town/Chinatown neighborhood. This is a fast-paced food-service environment with an emphasis on providing a dignified dining experience for our customers, many of whom are houseless or low-income. Sisters is a place of building relationships, community organizing, and nourishing meals. Volunteers are welcomed into our community! Please visit our volunteering website to learn more.

SMART (Start Making A Reader Today)

Volunteer with SMART (Start Making A Reader Today) help children discover the joy of reading! We engage community volunteers to help PreK - third grade children become confident readers by providing one-on-one literacy support, valuable adult mentorship, and books for the children to keep. Volunteer to read for one hour per week from October through mid-May as a SMART Reader! Applications accepted year-round. SMART has over 90 programs in Multnomah, Clackamas, and Washington counties. Please visit our volunteering website to learn more.

SOLVE

SOLVE is a statewide, nonprofit organization with a mission to bring Oregonians together to improve our environment and build a legacy of stewardship. We mobilize one of Oregon's largest volunteer networks to clean up our beaches, parks, neighborhoods, and

other natural spaces through litter cleanups, invasive plant removal, and planting native trees and shrubs all over the state, year-round. Find a community-based event near you, or attend a training to become a leader. Please visit our volunteering website to learn more.

Store to Door

We provide an affordable, personalized grocery delivery service to home-bound seniors and people with disables. Our volunteers and staff reduce clients' isolation by building relationships through weekly phone calls and visits. Volunteer tasks include grocery shopping (Wednesday and Thursday mornings at the Beaverton and Hollywood Fred Meyer), taking grocery orders, delivering groceries, community engagement, administrative support, and more. Please visit our volunteering website to learn more.

Sunshine Division

Sunshine Division offers volunteer opportunities to people of all ages to work in either our food pantries or our clothing rooms, providing free food and clothing to Portlanders in need. Volunteer shifts run in three-hour time increments Mondays - Saturdays. Volunteers greet clients, stock shelves, sort food and clothing, hang clothing and help check out clients with their food and clothing. We now have two Portland locations needing volunteers, 687 N Thompson Street, and 12436 SE Stark Street. Please visit our volunteering website to learn more.

The Dougy Center for Grieving Children & Families

Volunteering with The Dougy Center enables community members to join an established non-profit providing direct service to grieving children, teens, and adults. Throughout training and ongoing supervision, volunteers are challenged to explore their own stories of loss, enhance listening and communication skills, and deepen their knowledge of grief and how it affects people of all ages. Volunteering opportunities include (1) Volunteer Group Facilitator: Volunteers complete a three-day (18 hour) training to work directly with children, teens, or adults grieving the death of a parent/sibling/partner as a group facilitator. They are under the direct supervision of a staff member. (2) Office Volunteer: Volunteers assist with a variety of administrative tasks such as making packets and cleaning/organizing child and teen areas. (3) Fundraising volunteer: Assist with fundraising events. Please visit our volunteering website to learn more.

Transition Projects

Volunteers play a large role in Transition Projects' mission, helping us sustain key areas of our work. Transition Projects helps provide individuals with the services, resources, and tools needed to end homelessness, secure housing, and maintain that housing. There are year-round opportunities for both individuals and groups to get involved in weekly, on-call, or one-time volunteer roles. Our biggest volunteer need is for meal provider groups to bring healthy, nutritious dinners to our shelters. Please visit our volunteering website to learn more.

Village Home Education Resource Center

We invite individuals with expertise and passion for a subject to submit a course proposal to offer a class. In addition, we invite people to serve as classroom assistants. There are also opportunities for one-time volunteering at an event.

Appendix F – Civic Engagement Report (Jennifer Pratt)

Presented to: Alan DeLaTorre, Chair,
Portland & Multnomah County's
Age-Friendly Civic Engagement
Committee

Presented by: Jennifer Pratt, Project Consultant

Date: December 18, 2018

ADAGIO

Project: Determining a 2019 Direction for Portland's Age-Friendly Civic Engagement Committee

Report: Summary of Findings and Recommendations

Methodology

An interview tool was developed, jointly, by Adagio and the Committee Chair. This tool was used to interview eight individuals, five Engagement Committee members and three partners.

Findings

Unclear Mission

1. Understanding of Mission Few members could speak to the Committee's mission. It was seen as so broad it was "fuzzy" for some, and no one could explain the distinct role created in the community through this mission.

2. Definition of Civic Engagement: Confusion or difference of opinion about the definition of "civic engagement" appears to be a significant reason the mission is unclear to interviewees. There were also differing perspectives on "volunteerism." Should volunteerism be a subset of civic engagement or an umbrella over civic engagement? And, entangled in this divergence of opinion was whether civic engagement might be a synonym for *community* engagement or, more specifically, did it imply engagement in the workings of government and policy-making.

3. Committee Strategy: Respondents were, for the most part, not clear about the Committee's 2017 strategy and called it fragmented. Likewise, most did not know what happened to the results of the 2018 Age-Friendly strategy session (held January 29) nor what the next steps were to implement it.

Uncertain Impact

1. <u>Concerns about Impact</u>: Several questions arose regarding impact – 1.) Are we effectively fulfilling the Committee's mission? 2.) Is our work enhancing Portland and Multnomah County Age-Friendly plans? 3.) Are we duplicating, rather than supporting, other organizations' efforts?

2. <u>Measures of Success</u>: Most Committee members could name a few successes, but none felt these fulfilled the objectives laid out nor that they had anything against which to measure their assessment.

3. <u>Named Successes</u>:

   a. Conferences (but thought it might be more an Age-Friendly-wide success).

   b. Website (but felt to be more an Age-Friendly-wide success, as well.) It was noted by a few interviewees that partners also organize volunteer opportunities and some wondered if the website could become even stronger if positioned as a quick and easy portal to link to other community organizations and their resource lists.

   c. Educating and influencing local policymaking (but, this was felt to have been mostly the Chair).

Operational Effectiveness

1. <u>Meetings</u>: Several interviewees expressed struggle with meeting effectiveness, value, and purpose. A few felt they brought more information than they left with.

2. <u>Role Clarity</u>: There is a lack of shared understanding about the role Committee members are meant to play. Some members believe that they are supposed to be doers. Others believe they are meant to be a resource in the community and to represent Age-Friendly across the community. There was disappointment expressed that they don't feel capable of this bridging role because they don't feel informed. The roles of the steering committee and city/county "sponsors" was also raised. There is concern that no one is engaged much (or at all) with what the Committee is trying to do.

3. <u>Membership</u>: Concern was expressed that the committee was mostly paid staff, and that more volunteers and retired older adults weren't being brought to the table, heard from, and plugged in.

Appendix G – Alan DeLaTorre testimony to Planning and Sustainability Commission, Residential Infill Project

May 15, 2018

Re: Residential Infill Project written testimony

Dear Planning and Sustainability Commission:

As a member of the Residential Infill Project Stakeholder Advisory Committee, I would like to thank you for your service and commitment to making Portland an inclusive and equitable community. Additionally, I would refer to a report written in 2016 that urged the Bureau of Planning and Sustainability to move beyond their past accessibility-related proposals that were deemed to have had "limited impact on the housing stock in Portland."[7] I would like to applaud the efforts to establish visitability as a part of the Proposed Draft under review, but still urge the Commission and other policymakers, to think beyond visitability and toward Portland's Comprehensive Policy 5.9 – Accessible Design for All – which encourages new construction and retrofitting to create physically-accessible housing…through the use of Universal Design Principles."

The Residential Infill Project falls short of Comprehensive Plan Policy 5.9 as "visitability" which is lower threshold of accessibility. Universal design goes beyond the basic needs of visitors and creates environments that are good for families, cyclists, able-bodied and injured individuals, and everyone. This is particularly important, when considering:

- In 2015, the U.S. Department of Housing and Urban Development reviewed American Housing Survey data and concluded that only 33.3% of our nation's housing stock was potentially modifiable, 3.8% was livable for individuals with moderate mobility difficulties, and less than 1% was wheelchair accessible.[8]

- At the local level in Portland, we do not have an understanding of the extent of our housing stock's modifiable or accessible nature.

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[7] DeLaTorre, A. (2016). Residential Infill Project – Participant Observation Report. Portland State University. Retrieved from: www.agefriendlyportland.org/sites/afp.tumblehome.com/ files/docs/Residential-Infill-Project-Report_DeLaTorre_2016.pdf

[8] U.S. Department of Housing and Urban Development (2015). Accessibility of America's Housing Stock: Analysis of the 2011 American Housing Survey. Office of Policy Development and Research, U.S. Department of Housing and Urban Development. Retrieved from: https://www.huduser.gov/portal/sites/default/files/pdf/accessibility-america-housingStock.pdf

Is Visitability a "Poison Pill"?

Testimony has been provided that the visitability provisions may be a "poison pill" to the development community, in particular to affordable housing developers and others developers looking to develop on Portland raised lots. Although it may make development more difficult, removing visitability would be a blow to older adults and people with disabilities. Portland's Residential Infill Project may improve livability, as long as you are not differently abled.

Dr. John Pynoos, in an interview on National Public Radio,[9] describes what he calls "Peter Pan Housing" as they are "designed for people who are never going to age nor grow old. They do have stairs. They often have inaccessible bathrooms. Some of them have inadequate lighting. They don't necessarily have safety features that will help people avoid falls. And some of them present actual hazards to people."

The Residential Infill Project provides the City of Portland with a unique opportunity to advance policy that meets the needs of its future population. Inaction now would "kick the can down the road" and there may not be another opportunity for infusing visitability into single family neighborhoods.

The Cost of Visitability

In an effort to quantify the costs associated with visitable design and construction – and benefits and challenges of visitable housing – an online survey was sent to 26 individuals with experience or knowledge in designing or developing housing in Portland who were also identified as experienced or interested in housing that would meet needs across the age and ability spectra. 12 total participants responded to questions pertaining to the feasibility of visitable housing development; several visitability requirements appear to necessitate minimal investment beyond usual design and construction practices (e.g. less than $250 for wider hallways, doorways, and visitable living areas). However, some visitability requirements were reported to be more costly (e.g. up to $1,250 for visitable bathrooms, no-step entrances) and were identified as prohibitive for some designers, builders, and developers.[10]

The following comments offer support and recommendations for aspects of the Residential Infill Project:

Support:
- I offer general support for the project as I expect that the proposed changes will lead to additional housing opportunities within existing single family zones in the City of Portland. This is incredibly important as many of these new housing opportunities will occur in neighborhoods that provide access to frequent service transit lines and services such as full-service grocery stores, government services (e.g., libraries, post offices).

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[9] Norris, M. (2011). Pynoos Discusses Senior Housing. National Public Radio, All Things Considered. Retrieved from: https://www.npr.org/2011/09/29/140932807/pynoos-discusses-senior-housing

[10] The report titled *Visitability in Portland: Findings from a 2018 Survey on Visitable Design and Constructions Costs* will be published on the http://agefriendlyportland.org/ "Our Publications" page by May31, 2018. The finds above are preliminary.

- I support the use of 0.25 miles as a metric of access to housing opportunities, as is the case with proposed new "a" overlay; the use of the 0.50 miles (or more) is problematic for some people who rely on mobility devices and/or are frail.

- I strongly supports the provision of new housing options that are visitable as they are beneficial to be accessed and visited by people with and without mobility impairments and encourage you to be brave and consider implementing the Comprehensive Plan policies aligned with Universal Design (e.g., backing in bathrooms for grab bars, hardware that would include level handles (rather than knobs), curb-less showers (rather than curbed shower or baths), sinks and stoves with roll-under cabinetry, and rocker light switches).

Recommendations:
- With respect to the 60'' turning radius in the bathrooms, consider allowing a density bonus so that visitable homes are allowed to be larger to accommodate a larger footprint. Also, the use of a "T-turn" is not ideal, but better than not providing bathroom access to someone in a mobility device.

- Consider adding visitability requirements to cottage housing as the social connections afforded by cottage housing provides an opportunity for people with disabilities to love in a robust social setting with ample social supports.

Sincerely,

Alan DeLaTorre, Ph.D, Co-coordinator, Age-friendly Portland and Multnomah County; Portland resident: 5659 N Denver Ave., Portland, OR 97217

Appendix H – Alan DeLaTorre testimony to the Bureau of Planning and Sustainability, Better Housing by Design project.

June 25, 2018

Re: Better Housing by Design

Context: Creating a Portland for All Ages and Abilities
As noted in previous written testimony, Portland's efforts to advance visitability are a positive "step in the right direction" and in line with the Portland Plan (see: Portland is a Place for All Generations) and the Comprehensive Plan (see policies under following sections: Urban Form, Design and Development, Housing & Transportation). It should be noted that although visitability is a worthwhile goal, the City of Portland should consider the policy as a starting point for future efforts to increase housing accessibility; the Comprehensive Plan, in particular, calls for universally-designed housing.

Background/Context
Since we do not know the stock of accessible housing in Portland, we should look to national numbers to understand that the U.S. (and likely Portland) faces a serious dearth of accessible housing: HUD estimated that in the U.S. only 3.8% of all housing was livable for individuals with moderate mobility difficulties and that less than 1% was wheelchair accessible.[11]

Locally, Portland's reported rates of disability are increasing (3.2% growth from 2015-2016 according to ACS estimates in 2016[12]) and that substantial numbers of Portlanders are living with various disabilities: more than 20% of the adult population (aged 18-64) reported having a disability in 2016 while more than half of the population aged 75+ (55.9%) reported living with at least one disability.

Additional research is needed to understand the existing accessible housing stock in Portland. This will lead to understand how inadequate the supply is – note: anecdotal information suggests that it is very difficult to find accessible housing in Portland; especially affordable housing that is accessible. To date, the City of Portland has not been able to identify the accessible housing stock and, therefore, policymakers and community stakeholders are unable to understand existing needs and to prepare for solutions.

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[11] U.S. Department of Housing and Urban Development (2015). *Accessibility of America's Housing Stock: Analysis of the 2011 American Housing Survey.* Office of Policy Development and Research, U.S. Department of Housing and Urban Development.

[12] U.S. Census Bureau (2016). Disability Characteristics: 2012-2016 American Community Survey 5-year Estimates (Portland).

The following comments are carried over from earlier testimony:

Bathroom Design

With respect to visitable bathrooms, although the 60-inch turning diameter is a preferred standard, T-turns should be explored as a reasonable trade-off when considering small unit sizes and housing affordability.

Affordable, Accessible Housing

We have a growing need for affordable housing citywide that accompanies the lack of accessible housing. However, the creation of affordable housing that comes at the expense of accessible housing (e.g., "we can't make it pencil when building to accessible standards") is an inequitable approach to housing people who are facing multiple barriers.

Residential Elevators

Please continue to explore the costs and benefits of residential elevators (i.e., not commercially-permitted elevators). In addition to design that may allow future elevators to be installed (e.g., stacked closest), please explore opportunities for incentivizing the building of new and/or retrofitted multi-dwelling units that can accommodate residential elevators.

Take a Bold Step: Apply for an Exemption re: Visitability

The City of Portland should request an exemption from the State of Oregon on the visitability policy pertaining to Better Housing by Design. The aging and disability communities can and should by worked with when/if such an exemption is requested. Personally and professionally, I would like to assist with supporting such an effort to request an exemption.

Sincerely,

Alan DeLaTorre, Ph.D., Research Associate, Portland State University

Visitability in Portland:
Preliminary Findings from a Pilot Project on Visitable Design and Constructions Costs

July, 2018

Alan DeLaTorre, Ph.D.
Research Associate
Co-coordinator - Age-Friendly Portland & Multnomah County initiative
Institute on Aging | College of Urban and Public Affairs | Portland State University

Monica Nunes, MPH
Public Interest Design Practicum
Center for Public Interest Design | School of Architecture | Portland State University
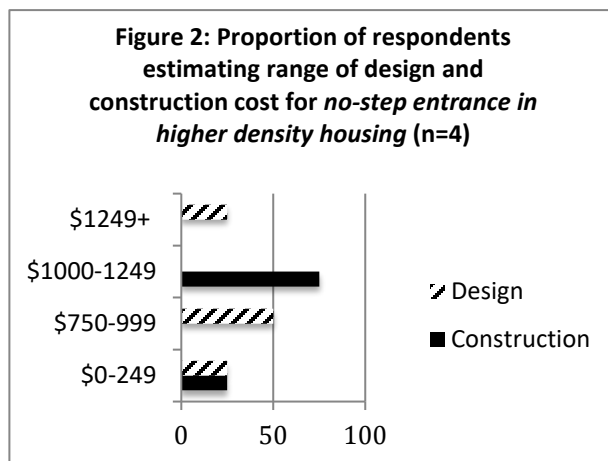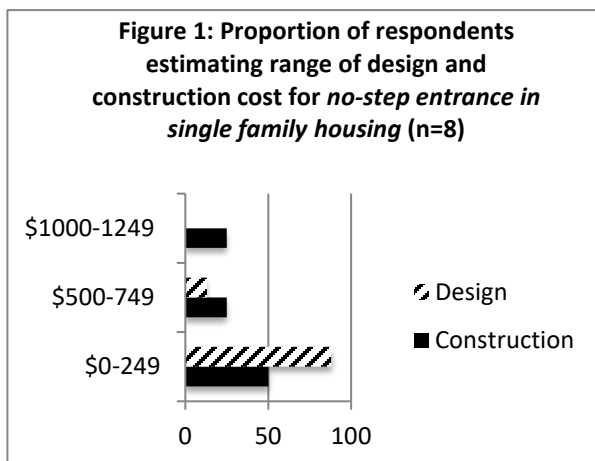
SUMMARY

The City of Portland is considering visitability policies as part of its Residential Infill Project[13] and Better Housing by Design project.[14] Visitable housing can be accessed and visited by people with mobility impairments (e.g., older adults and people with disabilities) while also providing convenience for all others (e.g. parents with strollers, cyclists). Draft policies include code pertaining to visitable entrances (i.e., one entrance with no step), bathrooms (i.e., one bathroom designed to accommodate a minimum 60-inch diameter), living areas (i.e., minimum of 100 square feet of living area), and hallways and doors (i.e., at least 32 inches wide).

Objectives and Methods

In an effort to quantify the costs associated with the above visitability requirements – as well as benefits and challenges of visitable housing – an online survey was sent to 26 individuals with experience or knowledge in designing or developing residential housing in Portland, Oregon who were also identified as experienced or interested in housing that would meet needs across the age and ability spectra. The survey response rate was 46% (12 participants). Eight participants responded to questions on single family housing and four reported on higher density housing.

Finding: Cost Estimates of Visitable Housing

Participants estimated the range of design and construction costs associated with visitability requirements in single family and higher density housing development. Costs for design and construction of wider hallways, doorways, and visitable living areas were minimal, estimated from $0-249. As detailed in Figures 1-4 below, the design and constructions costs for no-step entrances varied; most respondents felt design and construction of no-step entrances and accessible bathrooms in single family homes would be less than $1,000, while costs for higher density housing were estimated to be higher. It should be noted that the height of the house above grade and/or the available area for a ramp, were reported to potentially impact the cost of no-step entrances.

Figure 1: Proportion of respondents estimating range of design and construction cost for *no-step entrance in single family housing* (n=8)

Figure 2: Proportion of respondents estimating range of design and construction cost for *no-step entrance in higher density housing* (n=4)

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[13] City of Portland, Residential Infill Project: https://www.portlandoregon.gov/bps/67728
[14] City of Portland, Better Housing by Design: https://www.portlandoregon.gov/bps/71903

Figure 3: Proportion of respondents estimating range of design and construction cost for *visitable bathroom with 60" turn diameter in single family housing* (n=8)
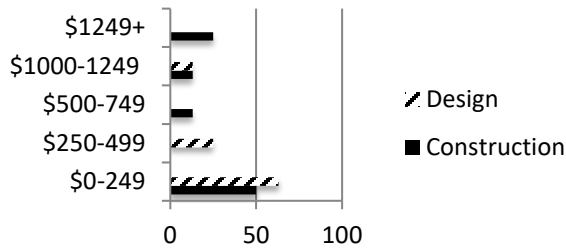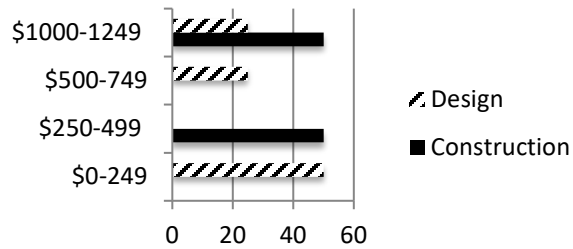

Figure 4: Proportion of respondents estimating range of design and construction cost for *visitable bathroom with 60" turn diameter in higher density housing* (n=4)

Finding: Benefits and Challenges for Developing Visitable Housing

Respondents were asked to identify potential benefits and challenges to visitable housing. In terms of benefits, participants described enhanced accessibility for occupants and guests with mobility challenges. Respondents also described the efficiency of building visitable housing from the outset given the expense of retrofitting later on. Finally, respondents highlighted the opportunity to enhance the flexibility of the housing stock to meet the needs of those across the lifespan. In terms of challenges, participants described difficulties with building no-step entrances due to external grading, drainage, and durability. As one participant commented:

> The design of no-step visitable entrances can be a lot more involved than the design cost listed if there are site grading issues to contend with or if a no-step (or 1-step) entry drives other design considerations (e.g. foundation type, site circulation, soil/siding gap).

Respondents also discussed the difficulty in accommodating for visitability space requirements, particularly in the case of visitable, first floor bathrooms, as well as in small spaces like accessory dwelling units. Describing these potential challenges, one participant stated:

> The 60" diameter circle bathroom standard is way too aggressive…[and] is more restrictive than the many bathroom design standards that are available as "ADA compliant" …I would prefer a more relaxed standard for this particular issue (2-3 ft. clearance in front of toilet).

Higher density housing developers also expressed unique challenges such as the need to consider the cost of elevators if it is not possible to make ground-level floors visitable. Also, affordable housing providers must negotiate funder expectations that contradict visitability.

Conclusion

This pilot study carries limitations due to sample size and generalizability. However, insight into the feasibility and costs of visitable housing design and construction was offered as several visitability requirements appear to necessitate minimal investment (e.g. less than $250 for wider hallways, doorways, and visitable living areas). Design and constructions costs for no-step entrances and visitable bathrooms in single and higher density homes may cost $1,000 or more. Additional research is needed; the research instrument and/or raw data may be made available upon request (aland@pdx.edu).

Understanding the Social Impacts of Neighborhood and Home Design for Older Adults in Portland, Oregon

Leah Brandis, RDN, CSG, LD

and

Alan DeLaTorre, PhD

Portland State University
September 2018

This report is intended to inform the City of Portland, community members, and others interested in housing, neighborhood design, social connectivity, health, and aging. The report contributes to the partial fulfillment of the requirements for the of Master of Public Health degree for Leah Brandis. (Cover page image credit: Pixabay.)

1

Executive Summary

Understanding the Social Impacts of Neighborhood and Home Design for Older Adults in Portland, Oregon

Portland, Oregon's population is growing, diversifying, and aging. Post-World War II planning and policies were, in part, intended to support the large baby boom cohort born from 1946 to 1964, through family housing and auto-oriented environments; in 2011, the first Boomer turned 65. In 2018 and beyond, the proportion of older adults in Portland, Oregon, the U.S., and the world continue to increase in a rapid and unprecedented manner. As our community strives to become increasingly age friendly, we should recognize that (1) we are all aging, and (2) our policies influence environments that should be attuned to our future demographic reality, e.g., a Portland that will be markedly older, more diverse, and in need of environments that support social connections, service provision, and physical access. Portland must be a city that supports its citizens regardless of one's ability, income, race, gender, or age. Based on a review of existing literature and interviews with 13 key informants, this report provides recommendations related to the following areas:

Physical infrastructure:

1. **Neighborhoods:** Plan, design, and develop neighborhoods to enhance social supports and access to services, thus facilitating aging in community.

2. **Homes:** Require and/or incentivize the development of homes that support the physical and social needs of older adults.

Social infrastructure:

3. **Social supports:** Support and cultivate social structures – formal and informal – that enable older adults to age in their homes and communities.

4. **Equity:** Advance policies and practices that can reduce the impact of economic inequities on social connectedness and the ability to age in community.

The creation of homes and neighborhoods that support our current and future population will require collaborative efforts from state, regional, county, and city governments, as well as community members and stakeholders. The opportunity for advancing public good through policy and program delivery must be informed by an understanding of how physical and social environments impact the aging experience. The design of our neighborhoods and homes has the potential to foster positive social connectedness that can aid in the prevention of adverse physical, mental, and cognitive health outcomes and enhance the quality of life for older adults and those at any age. In summary, creating housing and neighborhoods that are age friendly and promote social connectivity is a sustainable solution to some of the challenges facing our aging population in Portland.

2

Background

As Portland considers policy changes to single and multifamily zoning codes there is an opportunity for city planners to address social determinants of health and advance community well-being. It is important for city planners to understand both factors that influence social connections as well as the impact of social connectedness on public health. This report highlights key literature pertaining to home and neighborhood design, social connectedness, health, and aging, and augments that literature with primary data collected through interviews with key informants in the Portland region in spring and summer, 2018.

Policy Landscape
The City of Portland has embarked on two housing-related projects, the Residential Infill Project[1] and Better Housing by Design.[2] These projects are exploring policy updates related to single dwelling zones and multi dwelling zones in the City of Portland; both projects have considered policies that would lead to increased accessible housing in the form of "visitability."[i] Visitability is intended to increase the accessibility and resiliency of neighborhoods by: adding to the supply of housing with fewer barriers to people with mobility impairments; adding options for people to stay in their neighborhoods as they age and downsize; offering convenience to other users of all ages (e.g., parents using strollers, cyclists); and helping to remove barriers that can lead to social isolation for those with mobility limitations.[3,4] Visitability, albeit a lower accessibility standard when compared with universal design or other forms of accessible design, is beneficial to people of all ages and abilities.

Age-friendly Communities
The World Health Organization (WHO) defines an age-friendly community as one that has structures and services that are accessible and inclusive of older people with varying needs and capacities, emphasizes enablement rather than disablement, and is friendly for people of all ages and abilities.[5] Scholars studying age-friendly communities have suggested that social connectivity is a basic benefit of age-friendly communities[6] which is influenced by factors such as one's home, social network, and access to services.[7] The Action Plan for an Age-friendly Portland[8] – approved by Portland City Council in 2013 – and Portland's Comprehensive Plan[9] both address the needs for Portland to move toward becoming increasingly age friendly.

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[i] According to the City of Portland's Residential Infill Project (April, 2018: www.portlandoregon.gov/bps/article/678777), a *visitable dwelling* must have: "a zero-step entry, wider hallways and doors (34 inches minimum), a bathroom with adequate maneuvering area and an area to socialize (minimum 70-square-foot room) on the same floor as the bathroom and visitable entrance. This is intended as a relatively low-cost but high-impact way to increase accessibility. It does not accomplish or cost the same as providing for full accessible living, but it does provide a platform for future home modifications that can be tailored to meet the specific needs of the occupant."

3

Demographic Background

Portland, Oregon's population is growing, aging, and diversifying. In 2011, the first "baby boomer" (i.e., the birth cohort born from 1946-1964[10]) turned 65; since then Portland has continued to age in a rapid and unprecedented manner like the state of Oregon, the U.S., and the world.[11,12] By 2030, it is expected that 20% of Portland's population will be age 65 or older,[13] compared to 11.6% in 2018.[14] Additionally, the disability rate in the U.S. has been slowly rising since 2010 and Oregon is among the states with the highest rates of people with disabilities living in community settings (rather than institutional settings).[15]

In addition to population aging and rising disability rates, our population is also becoming more diverse. By 2060, 55% of the U.S. population aged 65 and older is expected to be non-Hispanic white compared to 78% in 2014.[16] Portland and Multnomah County are also experiencing a growth in the proportion of people of color and the overall diversification of its population.[17] With respect to housing diverse older adults in the U.S., older Asians (46%), Hispanics (43%), Blacks (33%), and other people of color (33%), were more likely than non-Hispanic whites (16%) to live in multigenerational households from 2011-15.[18] These data suggest that differences exist with respect to housing patterns of ethnic groups and it is important that we consider race, ethnicity, and culture when designing future homes and neighborhoods.

Caregiver Demand

There is currently a workforce shortage with respect to professional elder care services which is expected to become exacerbated as our demographics continue to shift.[19] In Oregon, the ratio of family caregivers is expected to drop from 6.9 potential caregivers for every person over 80 years of age in 2010, to 2.8 by 2050.[20] Although expectations exist that family, friends, and neighbors will support older adults as they age, data suggest that many forms of caregiving are being "outsourced" to nonfamily members.[21,22] With limited funding for government safety net programs,[23] older adults' social networks will be important to meet their evolving caregiving needs. We must rethink support systems as the pool of available caregivers shrinks due to individuals having fewer or no children, relatives who live far away, and the general decrease in the availability of family caregivers.[24]

Social Determinants of Health

We know quality of life for older adults is influenced by their physical, mental, and cognitive health[25] and that those aged 50 and older typically experience higher levels of exposure to neighborhood conditions, have more physical and mental health vulnerabilities compared with younger adults, and are more likely to rely on community resources as a source of social support.[26] Furthermore, there is strong evidence that social relationships impact health outcomes. For example, lack of social connection carries a mortality risk comparable to smoking, obesity, inactivity, and air pollution.[27] There is sufficient evidence to support prioritizing public health interventions that build social connections alongside current priorities such as addressing obesity and

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physical inactivity.[28] We also know that both physical and social structures within our society influence social connections.[29, 30] Physical structures, such as accessibility of homes, sidewalks, and transportation allow people to socialize together[31] and social structures – e.g., availability of social networks, patterns of economic inequity – impact our social connectivity and ability to age in community.[32]

Aging in Community
It is clear that most older adults prefer to age in their current home and community.[33,34] Historically, policy has focused on services to meet the needs of individual older adults; however, limitations of this approach are becoming clear (e.g., limited funding for services, workforce shortage).[35] The recent focus on aging in community highlights the need for supporting individuals with appropriate infrastructure while understanding the importance of relationships as an upstream approach to optimizing the aging experience.[36] Although aging in community can look very different due to the vast array of experiences of older adults,[37] there is a common need for physical, social, and service infrastructures that support healthy aging.[38,39] Age-friendly community initiatives should engage stakeholders and strive to advance environments in a manner that enables all community members, regardless of age or ability, to age in their home and/or in their current community.[40]

In order to facilitate aging in community and to promote the optimal aging experience, policies and programs should address physical barriers, as well as considering perceived barriers to individual behaviors that contribute to physical,[41] mental,[42] cognitive,[43] and social health.[44] Creating accessible physical environments and supporting social structures that minimize those perceived barriers will increase the likelihood of older adults initiating behaviors that we know support well-being. This will require a continuum of housing options that facilitate aging in community as well as neighborhoods designed to be supportive and accessible. Housing options to consider include smaller homes, accessory dwelling units (ADUs), cottage clusters, attached housing (e.g., townhomes, stacked flats), and apartments; additionally, it is important to facilitate intentional social structures that are imbedded in those designs such as multigenerational housing, age-restricted communities, and cohousing.[45]

The Impact of Policy on Environments, Social Connections, and Health
Figure 1 (see p. 6) provides a summary of how land use and housing policy affects physical and social environments, social connections, health, and quality of life. The figure is based on the review of literature and attempts to summarize relationships discussed in preceding background section.

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Figure 1: Impact of Policy on Environments, Social Connections, and Health
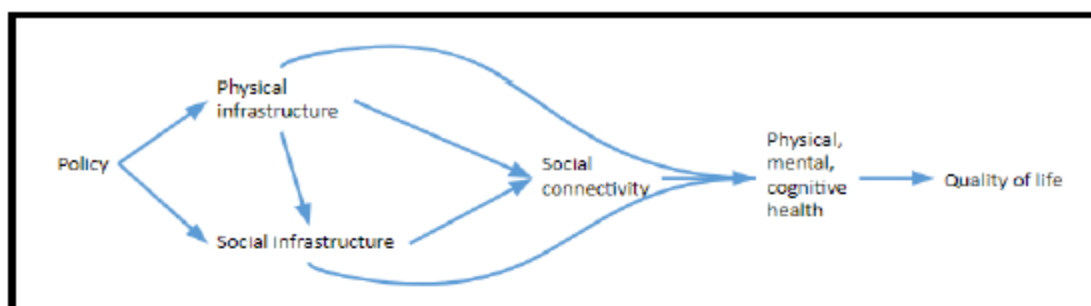
Methods

Between March and September 2018, literature was reviewed – i.e., community reports, peer-reviewed journals, popular press – that focused on age-friendly communities, environmental gerontology, home and neighborhood design, and other topics pertaining to social connectivity, public health, and equity.

From June to July 2018, 13 key informants were interviewed on the following topics: ongoing local policy processes, social connectivity of older adults, and home and neighborhood design (see Appendix A). Interviewees were selected based on their knowledge of older adult services or urban housing policy and design. At least three respondents were selected to represent the following groups: government agencies, direct service providers, community-based groups, and housing designers/developers.

Upon completion of the interviews, a content analysis of transcriptions were analyzed using pre-developed themes (e.g., policy, social connections); however, new themes also emerged (e.g., economic inequities) that were included in this report.

Limitations of the Research

The ability to make generalizations based on this qualitative study is constrained by several aspects of the research design. Limitations of this research include the small sample size, a lack of racial and ethnic diversity of individuals interviewed, and the research population being focused on key informants rather than older adults who have day-to-day experiences in housing and neighborhoods. It is important to note that several participants would fall into the category of community-residing older adult, but were selected for their knowledge and experience.

Future research could include more diverse voices, an older adult perspective, and a pre-post intervention study (e.g., making observations before and after policy changes have taken effect). In addition, it is important to note that the policy landscape was shifting through the duration of the research period and there was substantial variation of knowledge among key informants pertaining to the proposed policies under discussion.

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Recommendations

The following recommendations are based on a review of existing literature and interviews with local key informants. These recommendations are intended to aid planners, policymakers, and community stakeholders in efforts to shape physical and social infrastructure; they provide policy direction by considering the evidence of how the design of environments affect social connections within the community, which ultimately influences health and quality of life.

Plan, design, and develop neighborhoods to enhance social supports and access to services, thus facilitating aging in community.

Historical development patterns focused on family-oriented housing and auto-centric community design which no longer serve our aging demographic in the same manner, especially those older adults who no longer drive and rely on walking or public transportation to access services such as grocery stores, pharmacies, medical appointments, entertainment, as well as opportunities for socialization.[46]

Physical design of environment is also important for mobility and socialization as neighborhoods with well-maintained street infrastructure and lower levels of noise and pollution enable residents to maintain social connectedness or cultivate new social networks.[47] It is also important to consider that even perceived environmental barriers to mobility are cited by older adults who experience loneliness.[48] Additional barriers to consider include difficulty navigating stairs, fear of tripping and falling over uneven sidewalks,[49] becoming tired from walking to a transit stop, or fear of losing bladder control when access to a restroom is limited during transit or at their destination.[50] A key informant described the mobility challenge:

> "Even if you could…take a bus with two transfers and then have to walk…it is too much work."

Housing in neighborhoods with access to amenities (e.g., grocery stores with healthy food, entertainment, and fitness centers) and services (e.g., home health nursing and therapy services, and home delivered meals) enable older adults to maintain physical health and increase social interaction[51,52,53] Past research has highlighted areas of Portland where higher proportions of older adults live with limited access to services such as grocers, parks, and frequent service transit.[54] Also, when older adults have access to transportation options, it can lead to more physical activity, access to appointments, shopping, and recreational opportunities, all of which will support social connection.[55] A key informant described challenges in accessing services:

> "If people can get what they need or get to the doctor, get their groceries, if there's ways those things are closer or transportation is available…it makes people more successful and they stay in their community. And those are the

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things that start to slide people towards nursing homes and other facilities….
Getting the services to people [is] the most important thing.

More than 85% of older adults who receive services such as home delivered meals, transportation, and homemaker services in their homes are able to remain in place rather than moving to a setting such as an assisted living or nursing home[56] which can save tens of thousands in Medicaid dollars[57] and other housing-related expenses. However, funding for older adult programs is limited[58] and navigating those services is often challenging. Professional services are called upon when social supports cannot meet the needs of older adults.[59,60]

A trusting and reciprocal relationship with neighbors has been shown to provide a sense of security and to support older adults in sustaining their independence.[61] Creating options to live close to one's social network so they can receive more physical and emotional support decreases the burden on services and increases quality of life for older adults.[62] As a key informant noted, "If they don't have a family network or people who can help them, they will often call [a service provider] and say 'I don't even know where to begin'." The interviewee felt it was isolating "if you don't really know anybody who can help you with [navigating services]."

Planners and policymakers can work together to ensure housing for older adults is located in neighborhoods with accessible infrastructure, that housing for older adults provides good access to amenities and services, and by understanding that perceived barriers to mobility and service access can impact older adults' utilization of services. In addition to physical access, neighborhood design can facilitate access to social structures that support older adults in their utilization of services and can support aging in one's home and community.

Require and/or incentivize the development of homes that support the physical and social needs of older adults.

Housing with accessible design features promote independence, physical safety, and social connectivity; such housing can prolong independence and delay the need to move into a care setting.[63] Peter Pan housing[ii] is ubiquitous in our community as local building and zoning codes have not adequately addressed accessible residential housing. With 40% of people aged 65 and older having reported living with a disability,[64] our housing stock is not serving our current population and will fall woefully short of meeting the needs of our rapidly aging population.

[ii] According to Dr. John Pynoos (National Public Radio, September, 2011: www.npr.org/2011/09/29/140932807/pynoos-discusses-senior-housing), "Peter Pan" housing is "designed for people who are never going to age nor grow old." Such housing has stairs present, it often has inaccessible bathrooms and inadequate lighting, and it does not commonly have safety features that will help people avoid falls; some housing presents hazards to people.

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One interviewee offered insight into the unit-selection process of a new housing development; they explained that older adults selected units with zero-step entrances and ground floor bedrooms, leaving other units for young families.

Visitable design has been shown to increase older adult independence[65] which improves their quality of life. This is important as the stairway injury rate for adults aged 75 and older was 13 times the rate for children and 37% of all falls result in hospitalization.[66] With respect to stair negotiation, a review of research findings recommended that older adults avoid stairs when possible to reduce potential for injury.[67] Zero-step entrances also facilitate easy ingress and egress for older adults which enhances mobility and enables them to access services and activities; group activities have been shown to be an effective intervention for social isolation.[68] A housing developer suggested the following with respect to accessible housing:

> "We open up a whole bunch of social connections [with accessible environments]. We are a society that values exchange and reciprocity. People wind up being devalued because we are not taking their gifts or accepting their gifts in terms of what they might share with us or their knowledge. It sets you up to be devalued because it is assumed you are not giving back because everyone is coming to you and it can be slight. It can be very subtle…When you are the person experiencing a disability…you want to go places but you can't always go in and share your gifts and sometimes it is really minor but it separates you out."

It is critical to understand that our current housing stock is inadequate for meeting the accessibility needs of the current population and this issue will be exacerbated over time as the proportion of older adults and people with disability increases. Planners and policymakers must find ways to require and/or incentivize accessible design; visitable design is a low bar for accessible housing – with universal design being a higher standard – but offers access to homes for visitors and is a marked improvement over the all-too-common Peter Pan housing that can be found throughout our community.

Support and cultivate social structures – formal and informal – that enable older adults to age in their homes and communities.

Housing can be intentionally designed to facilitate social structures in many forms such as intergenerational and age-restricted communities, cohousing, cottage clusters, shared housing, and other settings. Older adults with high levels of social capital have better physical and mental health outcomes,[69] increased social connectivity can reduce rates of suicide (especially among older men),[70] and those with strong social connections are less likely to be readmitted to the hospital.[71] One key informant detailed the danger of social isolation:

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"Loneliness can be a killer…folks need someone to talk to."

Intergenerational communities have been shown to support intentional relationships and provide a sense of purpose, decrease loneliness, and increase social connection.[72] Residents of every age can share their strengths. For example, older adults can offer valuable experiential advice, lead a disaster preparedness effort, and provide caregiving for children. In exchange, older adults can benefit from relationships with children and young adults who provide cognitive stimulation, which can reduce the risk of dementia.[73] Younger people can also offer physical support such as bringing in groceries, provide meals during an illness, and provide caregiving when older adults are unable to meet their activities of daily living. One respondent described their perspective on housing that includes people of different ages:

> "In my mind the ideal [housing environment] is people of different ages because you have kids and families, and people who are retired, and single people and people who are coupled, and you have this plethora of skills and people can kinda trade with each other and support each other."

Age-restricted communities have significant benefits of scale and appeal to some older adults. Usually neighbors are retired and have more time to socialize than younger people who may be busy working or caring for children. Activities are formally and informally organized that enable older adults to socialize more easily.[74] Services that older adults benefit from can be provided more efficiently and effectively.[75] One responded described the experience of an older adult in a 55+ community:

> "She would walk down to the community center in her neighborhood…and what spawned from that was all the ladies in her neighborhood…would create a book club in one home and she did bridge and all these activities [with] a group of like-minded people wanting to keep each other social and active."

Another respondent described the difference between a housing development that encouraged social interaction and those that were more independently-oriented:

> "[In] congregate settings you will have people come do foot clinics and you can have 20 people come down for a service they didn't even know they needed, whereas, if I live alone in my home or in my one-off unit, someone is going to have to come to me or I'm going to have to go to the Hollywood Senior Center."

Programs that facilitate building relations with neighbors have successfully increased sense of social connection.[76] This was reflected in a statement from a respondent: "[If] the dwelling or neighborhood doesn't have any social functions built in, how are you going to get to know your community and the risk of social isolation goes way up…who is going to be looking in on you, checking in on you, making sure you are getting your mail?"

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Villages NW is the Portland region's village[iii] that offers a "hub" (i.e., coordinating 501(c)3 nonprofit) and "spoke" (i.e., geographically-based local groups) model that brands itself as a network of "neighbors helping neighbors stay neighbors."[77] Villages support aging in place, provide access to social experiences, improve access to services, and aid in maintaining quality of life. Examples of services provided include changing a light bulb, transportation to a doctor appointment, and access to vetted professional vendors. One service provider described the village concept as:

> "[It] hooks you up with other people who are also not getting out enough and gives you one group you can go to ask for assistance or for social interaction and gives you events that happen on a regular basis. Definitely helps those people who don't have that network themselves."

Cohousing is a housing model that exists and is growing in the greater Portland region[iv] and has been shown to provide a higher level of social support than retirement communities.[78] Cohousing can either be age-restricted or multigenerational; a respondent commented that mixed-generation cohousing offers the potential for everyone to benefit from the variety of experience and strengths of residents living in the development:

> "What I love about the cohousing model is that you may have an older adult who needs help putting their support stockings on but can still hold a baby on their lap for two hours if you need to go run an errand. How do we blend that in a way that like we're helping create more livability because we are connecting people with the services they need through providing resources to people who are not able to get the resources on their own."

In Portland, an innovative intergenerational housing model called Bridge Meadows has emerged with the intention of supporting foster children, adoptive families, and older adults seeking affordable housing.[79] The community is intentionally designed to promote relationships and supports between the generations and there is an expectation for everyone to support each other. Bridge Meadows has recently expanded to open a second location in Beaverton and consults nationally on the planning and development of similar projects.

[iii] According to the Village to Village Network (2018: https://vtvnetwork.clubexpress.com/), "Villages are nonprofit, grassroots, membership organizations that are redefining aging by being a key resource to community members wishing to age in place. Villages are a social support network for their members that provide necessary services, (such as transportation, technology assistance, running errands to the pharmacy and grocery store), community engagement activities and other important resources crucial to aging interdependently. A Village reflects the community it serves and transforms the 'Silver Tsunami' of aging baby boomers into a 'silver reservoir' that grows and strengthens its community."

[iv] Cohousing.org lists more than 10 co-housing developments in Portland (2018: www.cohousing.org) and describes cohousing as an "intentional community of private homes clustered around shared space. Each attached or single family home has traditional amenities, including a private kitchen. Shared spaces typically feature a common house, which may include a large kitchen and dining area, laundry, and recreational spaces. Shared outdoor space may include parking, walkways, open space, and gardens. Neighbors also share resources like tools and lawnmowers."

A key informant offered an idea for housing older adults that shared similarities to the Bridge Meadows model:

> "[Since] it is becoming harder and harder to get caregivers [why don't we bring] single moms who need affordable housing together with older adults who need affordable housing...to connect [and] support each other in living and that is part of the contract going into this affordable housing."

ADUs and cottage clusters can also support intentional relationships and preserve a sense of privacy.[80] Living in close physical proximity can increase social participation.[81] A respondent agreed with the literature, stating: "I think aging-in-place in dense communities is much more reasonable and provides a higher quality of life." When older adults live in close proximity to a younger people or families, these arrangements can benefit all residents in ways such as enabling older adults to assist with child care or receiving support in the form of home maintenance, socialization, and a sense of purpose.[82] A 2010 Benton County health impact assessment identified benefits of ADUs as providing living spaces for those who were ill or living with a disability, placing older adults near caregivers, and offering intergenerational housing.[83] Along those lines, a respondent proposed a potential approach to housing:

> "If we could build a cottage in the back and have somebody live there while we live here, who could eventually be a part-time caregiver if we needed it, or we can move into the smaller unit and rent out this bigger house. I think that's another [option]. You can have your own unit and have help close by. That to me is a good model."

Promoting intergenerational communities can occur through land use policies that support a variety of unit sizes in a neighborhood, as well as housing that is accessible for people with disabilities. Planners and policymakers can work with service providers on creative options such as affordable housing that allows and/or promotes intergenerational communities. Land use policies should allow and encourage age-restricted communities, cohousing, cottage clusters, and ADUs which all provide increased density that may support social structures that allow aging in community.

Advance policies and practices that can reduce the impact of economic inequities on social connectedness and the ability to age in community.

Financial factors impact older adults' ability to nurture positive social networks[84] and to age in community.[85] While 7.5% of Oregonians aged 65 and older live at or below the poverty line in 2016, that number was even higher for certain subgroups of older adults, including 21% of Blacks, 12.7% of Asians, and 11.7% of Hispanics.[86] With housing prices continuing to rise in Portland,[87] older adults are struggling along with everyone else to find affordable housing. Renters are more likely to have low-income and are less likely to live in the same dwelling for a long period of time.[88] Affordable housing in Portland is often further away from the city center where services and

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supports are concentrated, yet there isn't good transportation access resulting in low-income older adults facing barriers to behaviors that support healthy aging.[89] A respondent opined:

> "Why you put people who are older and living on a fixed income and have varying ability out away from [access and services] is beyond me....Out East is probably more affordable but it's not accessible at all."

Costs of displacement include loss of access to goods and services and loss of accessible neighborhood features.[90] Displacement has been shown to be associated with increases in emergency department visits and hospitalizations.[91] For older adults, displacement may be especially harmful when it results in loss of their support system or relationships with service providers they have grown to rely on and trust. A respondent described the experience an older person may have after moving:

> "They had to move there because of economics. They had to move to a new community. They don't know their neighbors and it is hard to rebuild that. Their worlds get really small. They go through trauma of the relocation with loss of friends, and your neighborhood grocery store and gas station, you just lose all of that. I think it is really difficult to recreate that and it just adds to the isolation and loneliness."

Interviewees with experience working with low-income older adults in Portland noted limited housing choices, lack of satisfaction, limited social capital, and reliance on the safety net system which is complex and often requires assistance to navigate. They noted that older adults may live in neighborhoods that lack sidewalks and access to transportation, are far from services, and feelings of being unsafe. A service provider described the experience of living in low-income senior housing:

> "Affordable housing seems to exacerbate those kinds of situations where there are more mental issues or other issues that people bring that cause problems... If a person has means and can move easily from one place to another, if you lived in an apartment and you didn't like the people who you were living near, you could decide to move if you are flexible and able. If you are not flexible and not able and don't have the means to do that, it is really hard. Plus, with the waiting list...you can't really go from one subsidized housing to another, you have to wait two to five years or longer, so you are kind of stuck which may exacerbate the problem."

In contrast, a housing developer described a very different experience for older adults who have the means to plan for their future and select a community that will provide access and supports:

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"Everybody has plans. They have taken a step to take charge of their aging. They aren't expecting someone else to do it. What do you think you can do for the community? What skills do you bring? Being proactive in playing a role in the community and not waiting for somebody to take care of you."

Those working with older adults who are financially comfortable expressed that those individuals often have good social capital and are proactive about investing in a community that will support them as they age. They also often live in neighborhoods with good sidewalks, good access to transportation, and are able to walk to amenities without fear of safety. Fortunately, supportive physical and social infrastructures have been shown to compensate for lack of resources for low-income older adults;[92] however, access for those communities remains a challenge.

Policymakers and leaders should encourage affordable housing near services, strive to prevent gentrification and mitigate the consequences of displacement, arrange property taxes so that older adults can remain in their homes one limited fixed incomes, increase the stock of affordable housing to allow low-income older adults the ability to live in a neighborhood the promotes positive social connections, and create physical and social infrastructures that compensate for lack of resources and decrease disparities.

Conclusion

Our community will continue to grow, diversify, and age. Leaders and policymakers must be proactive in addressing these trends. Key informants interviewed as part of this project shared the opinion that it is going to take a collaborative efforts from state and local governments, neighborhood associations, and grassroots organizations to create ideal environments that support these changes. Policy suggestions offered include offering flexibility in land use that offers more ways to "create smaller units that are economically feasible within a neighborhood" as well as adjusting policies to ensure that Portland is not "perpetuating inequity by creating policy that supports wealthy white able-bodied community members versus other community members."

One respondent felt that what was needed was a campaign on aging in community:

"[We need] a pro-aging campaign or get-to-know-your-neighbor campaign where we could start to value older adults and have an interest in them. I think that would change how people approach older adults."

The Residential Infill Project and Better Housing by Design project are opportunities for the City of Portland to advance the 2013 Action Plan for an Age-friendly Portland and Portland's Comprehensive Plan. Portland must figure out how to advance accessible housing and neighborhoods that enhance and support social connections within communities.

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In summary, investing in the design of our neighborhoods and residential homes has potential to foster positive social connectedness that can prevent adverse physical, mental, and cognitive health outcomes and enhance the quality of life for older adults and those at any age. Creating housing that promotes social connectivity is a sustainable solution to some of the challenges facing our aging population in Portland.

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Toward Age-Friendly Living:
Breaking Down Barriers to Accessibility Code

Report on Multi-family Housing Policy and Regulation

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Commissioned by:

Portland State University
and Age-Friendly Portland

Portland State
Institute on Aging

Age-Friendly
PORTLAND & MULTNOMAH COUNTY

Foreword by Alan DeLaTorre

Portland State University, College of Urban and Public Affairs

In 2011, the U.S. Department of Housing and Urban Development reported that approximately 33.3% of U.S. housing stock was potentially modifiable, 3.8% was livable for individuals with moderate mobility difficulties, and less than 1% was wheelchair accessible (HUD, 2015). Although similar data are not available for Portland, the city's current housing stock – like that of the U.S. – does not meet the current or future needs of population that is aging and witnessing more people with disabilities living in community-based settings.

The City or Portland has several policies in place – Portland Plan (City of Portland, 2012); Age-friendly Action Plan (Age-Friendly Portland Advisory Council, 2013); Comprehensive Plan (City of Portland, 2016) – that aim to increasing its housing adaptability and accessibility. However, additional efforts are required if we aim to meet the needs of a population that is aging in a rapid and unprecedented manner.

The Age-friendly Portland initiative is collaborating with the Portland Housing Bureau, the Portland Commission on Disability, and other partners to clarify accessibility requirements associated with Portland multi-family housing projects with multiple funding sources. WerkSTADT Urban Planning and Urban Nomad Lab were commissioned by Portland State University's Institute on Aging and the Age-friendly Portland initiative to complete a month-long preliminary study of four code and guideline documents guiding housing accessibility. WerkSTADT's Founder and Director, Kate Holmquist, AICP Certified Urban Planner and licensed Landscape Architect; and Adam Hostetler, licensed Architect and owner of Urban Nomad Lab; together they bring over twenty-five years of multi-disciplinary professional experience in multi-family and affordable housing policy, design and development to this effort.

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This report is intended to provide guidance to the Portland Housing Bureau that should lead to the development of accessible and adaptable housing. Additionally, the report bolsters the City of Portland's effort to move toward housing that is good for people of all ages and abilities, or housing that is age friendly, considering the following:

- **An age-friendly community** is one that is a "great place to grow up and grow old [with] affordable, accessible, and safe housing" (Neal & DeLaTorre, 2016, P. i).

- **Meeting Portland's policy goals**: As noted earlier, the Portland Plan, Age-friendly Action Plan, and 2035 Comprehensive Plan all focus on improving Portland's accessible and adaptable housing stock. Such housing is not only good for older adults, but it is good for families, cyclists, and everyone in our community, regardless of age or ability.

- **Demographic imperative:** The population aged 65 and older in the six-county greater Portland region (i.e., Clackamas, Columbia, Multnomah, Washington, Yamhill & Clark Counties) is projected to grow between 98.1% and 122% from 2010 to 2035. That growth represents the highest proportional changed when compared to all other cohorts (i.e., those aged 0-19, 20-44, and 45-65), as well as the overall population growth (Lycan, 2016).

- **Accessible housing**: In the Portland-Vancouver-Hillsboro Metropolitan Statistical Area, when combining multi-family and single-family units, the majority required the use of stairs to enter the building from the outside (i.e., 411,300 residences did not require the use of steps; 547,600 did require steps) (American Housing Survey, 2015).

- "Age-friendly communities offer a continuum of housing options and supportive services for the independent through the dependent, allowing for aging in one's present home or community, reducing the need for moves and preventing or postponing costly public and private expenditures for long-term institutional care old (Neal & DeLaTorre, 2016, P.20).

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Contents

Introduction By the Authors

WerkSTADT Urban Planning and Urban Nomad Lab were commissioned to review the realities of multi-family housing development, and the complexities of meeting accessibility requirements in Portland, Oregon. The resulting preliminary month-long study was comprised of a technical review of four (4) accessibility code and guideline documents identified by the City of Portland Housing Bureau (PHB): the *International Building Code* (IBS 2012) as referenced in the 2014 *Oregon Structural Specialty Code* (OSSC 2014); the *Fair Housing Act Guidelines* (FHAG); the *Uniform Federal Accessibility Code* (UFAS); and the Americans with Disabilities Act (ADA) *ADA Standards* (ADA 2010). Further examination of the history and relationships between laws, standards, guidelines, and codes pertaining to accessibility in multi-family housing provides context and clarification on the overlap, contradiction, and relationships between these documents.

Multi-family housing projects regularly have multiple funding streams across levels of government that trigger accessibility requirements, putting substantial onus on development teams to navigate complex, interrelated codes and design standards. This is often the case for affordable housing projects, and projects with local PHB funding. The persisting housing emergency, declared by the City of Portland since 2016, underscores the importance of housing delivery and the pace of production and construction. The goal of this work was to analyze the documents listed above in order to assist PHB in assessing accessibility code compliance and support local efforts in accessible and age-friendly housing development and policy.

This report provides the Portland Housing Bureau with an overview of the current regulatory landscape related to building accessibility for Oregon multi-family projects, and and assessment of the level of complexity of accessibility code compliance.

WerkSTADT Urban Planning and Urban Nomad Lab were able to approached this research comprehensively, with expertise in both the design and development of housing. WerkSTADT's Founder and Director, Kate Holmquist, AICP Certified Urban Planner and licensed design professional has worked on both policy and development of affordable housing; Adam Hostetler, is a licensed Architect and owner of Urban Nomad Lab, works primarily on workforce housing. Together they have over twenty-five years of professional experience in multi-family and affordable housing policy, design and development.

I. Accessibility over Time

Evolution of Federal Policy

The passing of key U.S. laws established regulations governing discrimination, including discrimination on the basis of disability. These regulations addressed inclusion across areas of people's lives, including access to services and physical access to buildings and facilities: accessibility.

The *Rehabilitation Act of 1973, United States Code* (USC, *Federal Statutes of the United States*), Section 504 (29 USC S 794), extended civil rights for people with disabilities, requiring non-discrimination on the basis of disability in any program or activity receiving federal assistance. Reacting to this federal mandate, Federal agencies administering programs providing federal assistance adopted separate regulations responding to these requirements. The U.S. Department of Housing and Urban Development (HUD) adopted department regulations effectuating Section 504 under the *Code of Federal Regulations* (CFR), 24 CFR Part 8: Non-discrimination based on handicap in federally assisted programs and activities of HUD.

The *Architectural Barriers Act* (ABA), (42 USC 4151-4157) preceded Section 504. Passed into law in 1968, "it was one of the first laws to address the built environment," (access-board.gov/guidelines-and-standards/buildings-and-sites/about-the-aba-standards). Unlike the Rehabilitation Act, ABA coverage was "limited to those funding programs that give the federal agency awarding grants the authority to establish facility standards," (ibid), and excluded facilities on military installations, as well as residential facilities under the purview of HUD, (access-board.gov/guidelines-and-standards/buildings-and-sites/about-the-aba-standards).

Two additional federal civil rights acts were passed that shaped what accessibility means in the United States. The *Americans with Disabilities Act of 1990* (ADA 1990) prohibited discrimination on the basis of disability in all areas of public life – and "all public and private places that are open to the general public," (ADA National Network, adata.org/learn-about-ada). Titles II and III of the *Federal Code of Regulations*, Title II, governing nondiscrimination on the basis of disability in state and local government services, and title III governing public accommodations and services operated by private entities, were adopted by the Department of Justice (DOJ) under 28 CFR Part 35 and Part 36, respectively. ADA regulations apply comprehensively to all new construction and alterations of existing facilities.

The *Fair Housing Act* (FHA), which was enacted as Title VIII of the Civil Rights Act of 1968 (42 USC 3601-3619), prohibits discrimination in the sale, rental, and financing of dwellings -- including on the basis of disability. FHA lays out basic design and construction requirements that apply to all -- both privately-owned and publicly assisted - multifamily dwelling units of more than four units and built for first occupancy after 1991. These regulations are enforced by HUD.

These five federal regulations outlined above, originate from civil rights protection and broadly establish accessibility requirements for design and construction. They collectively span physical requirements for federal and federally-funded buildings, all multifamily dwelling units, and requirements for access to public spaces and services operated by private entities, ensuring accessibility for all persons. Diagram A, *Federal Requirements*, identifies the triggers for these regulations and lays out the broad scope they prescribe.

They require non-discrimination and set scoping requirements and definitions for accessibility -- but they do not provide paths or codes for compliance.
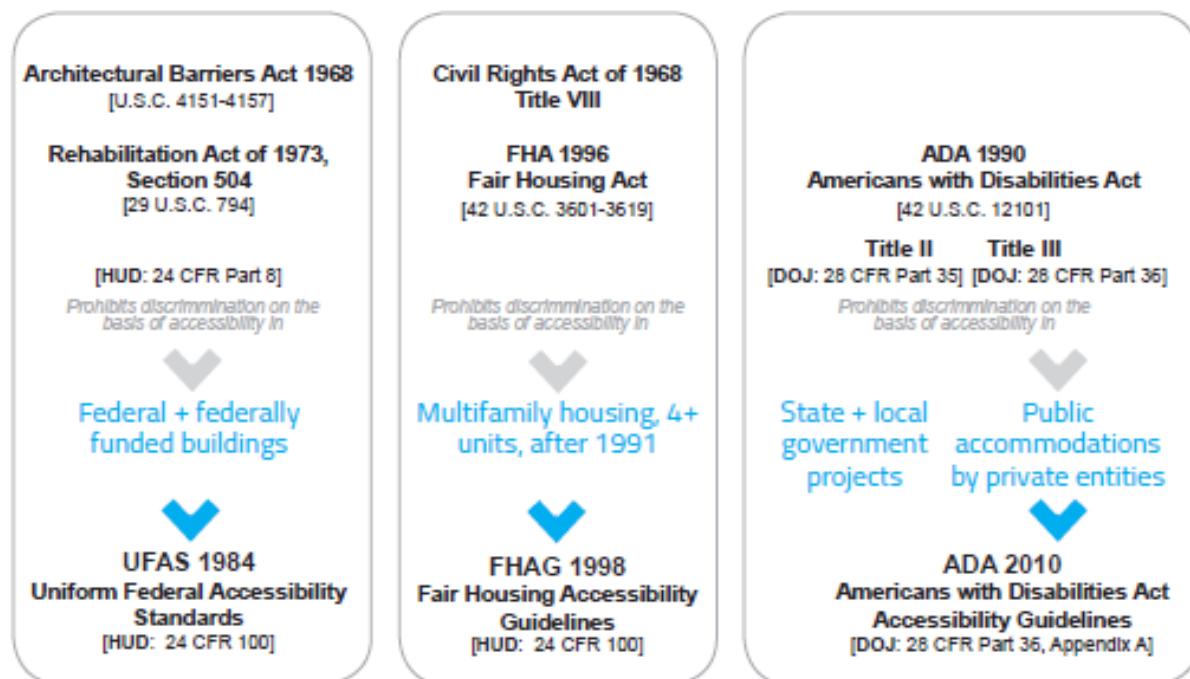
Architectural Barriers Act 1968 [U.S.C. 4151-4157]	**Civil Rights Act of 1968** **Title VIII**	**ADA 1990** **Americans with Disabilities Act** [42 U.S.C. 12101]
Rehabilitation Act of 1973, **Section 504** [29 U.S.C. 794]	**FHA 1996** **Fair Housing Act** [42 U.S.C. 3601-3619]	**Title II** **Title III** [DOJ: 28 CFR Part 35] [DOJ: 28 CFR Part 36]
[HUD: 24 CFR Part 8] *Prohibits discrimination on the* *basis of accessibility in*	*Prohibits discrimination on the* *basis of accessibility in*	*Prohibits discrimination on the* *basis of accessibility in*
Federal + federally funded buildings	Multifamily housing, 4+ units, after 1991	State + local Public government accommodations projects by private entities
UFAS 1984 **Uniform Federal Accessibility** **Standards** [HUD: 24 CFR 100]	**FHAG 1998** **Fair Housing Accessibility** **Guidelines** [HUD: 24 CFR 100]	**ADA 2010** **Americans with Disabilities Act** **Accessibility Guidelines** [DOJ: 28 CFR Part 36, Appendix A]

Diagram A: Federal Requirements

Guidelines and Compliance

In order to carry out the intent of U.S. laws governing accessibility, guideline documents were adopted by the federal government.

The *Uniform Federal Accessibility Standards* (UFAS) represented an early attempt to present guidelines for compliance with federal U.S. regulations; written by the United States Access Board (USAB), they were adopted by the U.S. Department of Housing and Urban Development (HUD) in 1984 to define the physical requirements for facility design of HUD federal and federally-funded facilities under Title 24, Subtitle A, Part 40 (24 CFR Part 40): *Accessibility Standards for Design, Construction, and Alteration of Publicly Owned Residential Structures.* Developed in response to the *Architectural Barriers Act*, UFAS is deemed to comply with the overarching federal Section 504 accessibility requirements. All federally assisted new construction housing developments with five or more units must design and construct five percent of the dwelling units and a minimum of one unit to be accessible in accordance with UFAS.

In 1991 the *Americans with Disabilities Act Accessibility Guidelines* (ADAAG) were adopted by the DOJ under ADA 1990. At the time of adoption, both ADAAG and UFAS were recognized as pathways to compliance under ADA 1990, (28 CFR Part 35.151(C), "Accessibility standards and compliance dates"). An updated 2004 guideline document, ADA/ABA written by USAB under the ABA, was adopted by the DOJ under the title of *2010 ADA Standards* (ADA 2010). Printed as Appendix A of title III in the Code of Federal Regulations (28 CFR 36.406(a)), ADA 2010 replaced the ADAAG standards for accessibility. ADA 2010 was adopted with the purpose of setting "guidelines for accessibility for places of public accommodation and commercial facilities by individuals with disabilities," (28 CFR 36, Appendix A), and of providing scoping and technical requirements for new construction and alterations" (ada. gov/2010ADAstandards). While a section of the federal *Americans with Disabilities Act*, 28 CFR Part 36, Subpart D, "New Construction and Alterations", is correspondingly laid out in the guidelines, some portions are not. This exemplifies the importance of recognizing that while federal guideline documents seek to provide clarification on compliance, regulation lies with the federal law. Guidelines "explain or illustrate the requirements of the rule: they do not establish enforceable requirements," (28 CFR 35.151(d), Scope of Coverage).

In 1998 HUD adopted the *Fair Housing Accessibility Guidelines* (FHAG) under 24 CFR Part 100, developed "in order to provide builders and developers with technical guidelines on how to comply with the Fair Housing Act for design and construction" (24 CFR 100.25). In addition to adopting FHAG as a guideline document, HUD has further clarified compliance with FHA, providing alternate pathways for compliance under 24 CFR 100.205(e), or "safe harbors." Of these pathways, the most direct is to follow the ANSI standards where indicated, or to adhere to ADAAG.

Diagram B, *Evolution of Accessibility Requirements*, developed by WerkSTADT and Urban Nomad Lab, outlines the history of and relationship between international, federal, and state regulations and guideline documents.
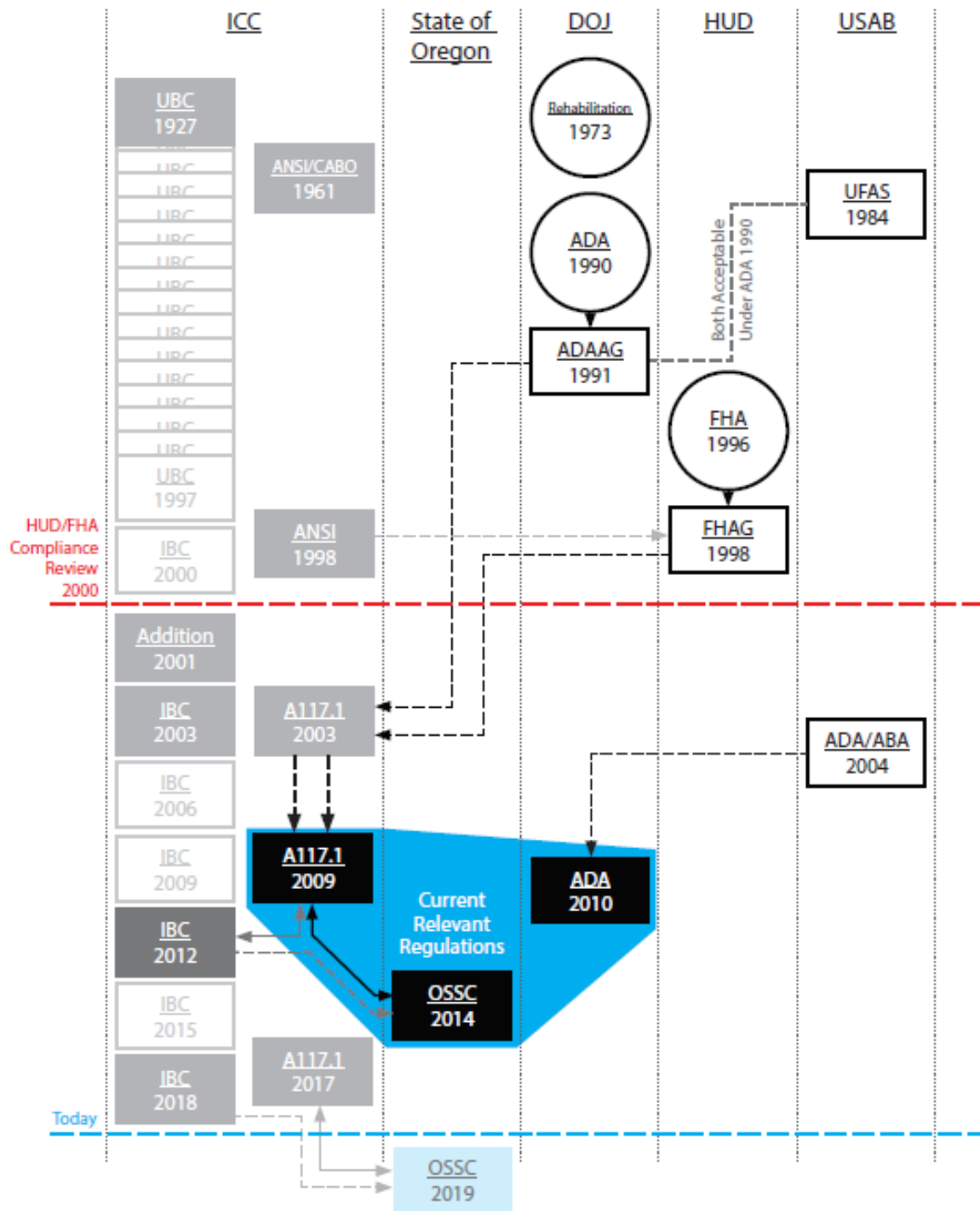
Diagram B: Evolution of Accessibility Requirements

Federal Guidelines and Milestones

Local and state building officials do not have the authority or the responsibility to enforce federal requirements, including FHAG and ADAAG. Interpretation is in the purview of DOJ and HUD, respectively. Happily, efforts to unify these laws with building codes have been underway for some time. In 2000, HUD officially reviewed the 2000 edition of the International Building Code (IBC) and the companion accessibility standards, A117.1-1998, and issued a report with a number of required modifications to the code. The International Code Counsel (ICC), publisher of both ICB and A117.1, accepted the proposed changes in the 2001 Supplement to the IBC.

Since 2001, HUD has issued press releases and statements in the preamble to the Fair Housing Act Design Manual officially acknowledging that the 2000 IBC combined with the 2001 Supplement, the 2003 IBC, and the 2006 IBC are all considered "safe harbors"; that is, they meet the scoping and technical requirements of FHAG. While subsequent IBC versions (2009, 2012, 2015, and 2018) have not been reviewed by HUD and given "safe harbor" status, this research concludes that these versions have not altered requirements in such a way as to jeopardize the compliance with FHAG. Please note that current Oregon Structural Specialty Code (OSSC 2014) is based on IBC 2012, and references ICC A117.1 2009.

Evolution of Standards and Relationship to Federal Guidelines

Accessibility laws, their associate guidelines, and building codes have evolved greatly over time. In the State of Oregon OSSC-2014 code applies, based on IBC 2012, and referencing A117.1-2009. At the federal level ADA-2010 is the most current standard but has evolved from a long series of laws and associated guidelines written by HUD, DOJ, and the USAB.

As far back as 1961, building codes were attempting to incorporate accessibility requirements. The Counsel of American Building Officials (CABO) was an organization attempting to unify building codes throughout the country. CABO was the secretariat for the American National Standards Institute (ANSI) convened the Accredited Standards Committee and together these organizations published CABO/ANSI A117.1. This document has been called A117.1 (1961, 1980, 1986) and CABO/ANSI (1992, 1998). The influence of this document is evidenced by FHAG's exclusive references to CABO/ANSI-1998 sections. CABO/ANSI was consolidated into ICC as part of an attempt to globalize the standards, and as a result all subsequent versions have been called ICC A117.1 (2003, 2009, 2017).

Similarly, different building codes have been in use across the country. The Universal Building Code (UBC) and the CABO code were consolidated by ICC as IBC 2000, as a part of the aforementioned effort, consolidating and unifying U.S. building codes. ADAAG and ANSI A117.1.2003 were developed in tandem. Consequently, their successors, ADA/ABA and ICC A117.1, are also largely coordinated. Both use the same numbering system, and nearly all section and subsection numbering aligns exactly. Text and diagrams are often identical. When DOJ adopted ADA/ABA as the new ADA 2010 standard, this document was already well coordinated with current building codes.

Diagram B, depicts the evolution of standards and their relationship to federal standards. These documents often allude to this tangled history in forewords and introductions. For a deeper dive, refer to *IBC Code and Commentary* Chapter 11 "General Comments."

Where Are We Now? What is the Confusion?

In the State of Oregon today, four separate documents -- guidelines and standards -- are followed for compliance with state and federal accessibility laws for design and construction of multifamily housing: OSSC 2014, FHAG 1991, ADA 2010, and UFAS 1984.

Across these documents, the same physical elements or building blocks of accessibility are defined in definitions and physical dimensions, comprising over hundreds of categories of requirements ranging from accessible routes to accessible units. While terms and categories are relatively comparable, subtle differences in terminology can cause confusion.

The complexity of code compliance is compounded when projects face meeting both federal and state accessibility requirements. Depending on project scope, different federal requirements are triggered, as laid out in Diagram A, *Federal Requirements*, which must be met in addition to the *Oregon Structural Specialty Code* (OSSC) in the State of Oregon.

Compliance -- ultimately determined and enforceable by different agencies and levels of government, and under different laws and statutes -- raises liability concerns for building professionals, housing developers and local government bodies: These four codes address similar elements of physical accessibility for persons with disabilities across many hundreds of pages, but they do not fully align. This creates a sense of complexity and perceived increase of risk and liability, and subsequently can lead to increased project costs.

II. Findings

Process

The focus of this assessment was to analyze the content of, and relationships between, four documents: OSSC 2014, FHAG 1991, ADA 2010, and UFAS 1984. A technical side-by-side, line-by-line comparison was conducted of the design requirements across the primary elements and building blocks of accessibility. As design professionals, we were able to analyze the extent to which these documents align in their categorical coverage and details -- and to identify the extent to which they diverge.

To facilitate direct code comparison, the issue of terminology discrepancies was addressed by using standardized and descriptive terms, rather than code-specific terminology. This careful consideration was extended to the nomenclature used to describe different levels of unit accessibility.
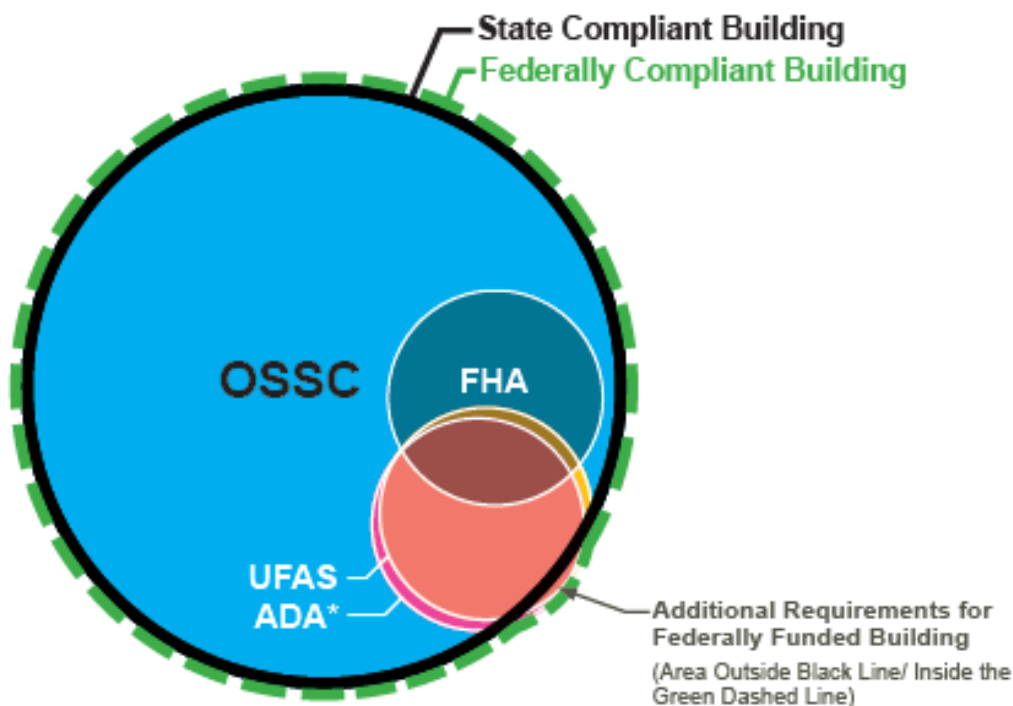

Diagram C: Current Overlap of State and Federal Codes and Requirements

*Note that ADA is a very broad civil rights law with protections extending far beyond the built realm and was specifically not written as a building code. Nonetheless the ADA circle represents only those portions of the guidelines related to accessibility of buildings.

Code Discrepancies

It is our general finding that the ICC IBC-2012 and A117.1-2009 codes, and consequently OSSC 2014, are remarkably well synced with the scoping and technical requirements of FHAG, ADA 2010, and UFAS. FHAG and ADA 2010 are wholly contained within OSSC 2014 and A117.1-2009. Minor differences do exist between FHAG and OSSC/A117.1; however these were rendered moot in 2001 by HUD's acceptance of IBC/A117.1 as a "safe harbor." In nearly all cases, OSSC has a stricter standard than FHAG. UFAS is nearly identical, however scoping differences exist in the underlying Section 504 civil rights law.

Section 504 requires 5% of dwelling units, or at least one, to be accessible. An additional 2% of units, or at least one, must be accessible to persons with hearing or visual disabilities. Note that Section 504 considers an "adaptable" unit to be "accessible". This is an important distinction because A117.1 does not use these terms interchangeably. OSSC considers "accessible" unit to be ready for immediate occupancy by wheelchair bound persons with no conversion required: grab bars are in place, no removable cabinets are permitted, and so forth. These are primarily required in places like hotels where there is no time to adapt the unit to the user.

This report focuses on multi-family housing, referred to within OSSC as R-2. OSSC 1107.6.2 does not require any accessible units in an R-2 apartment building. Instead, OSSC requires 2% of all R-2 units to meet Type A standards for buildings with more than 20 units and all units to meet Type B standards in buildings with more than four units. Type A units are written to reflect the requirements put forth in ADA and are defined in section A117.1.1003. They are "adaptable" units, meaning they are designed to be fully accessible with only minor work. Grab bars may be installed, but the reinforcing to accept them must already be in place. Sinks may have removable cabinets provided that the sink can stand on its own, the space behind and below the cabinet are finished, and removal would not require plumbing work. These spaces also require things like lower work surfaces in kitchens.

Type B units reflect the requirements of FHA as defined in A117.1.1004 and are considered "usable," meaning they provide enough space to accommodate a wheelchair bound person, but would not be ideal on a long term basis. This type allows for smaller kitchens and bathrooms and does not require a turning radius in each room. However, reach requirements and counter heights remain consistent.

If no elevator is provided, at least one story must be accessible, with the required Type A units outlined and the remainder to be Type B. Some other atypical exceptions do exist, see 1107.17.2-4. While not relevant to this documents, accessible units are required for R-2 buildings which are not apartments, monasteries, or convents -- see Table 1107.6.1.1.

Though it is beyond the scope of this analysis and review, it should be noted that IBC 2017 and A117.1-2017, upon which the forthcoming OSSC 2019 will be based, go beyond the requirement of even ADA 2010 in many respects. Many of the so-called "Building Blocks" -- including circular turning radius, T-shaped spaces, and clear floor spaces -- which have remained unchanged since accessibility protections were first introduced, are being enlarged beyond the sizes required in ADA 2010 or UFAS. For any technical requirement not specifically mentioned below, one should refer to the A117.1-2009, as it is a single source that brings the strictest standards of each document together.
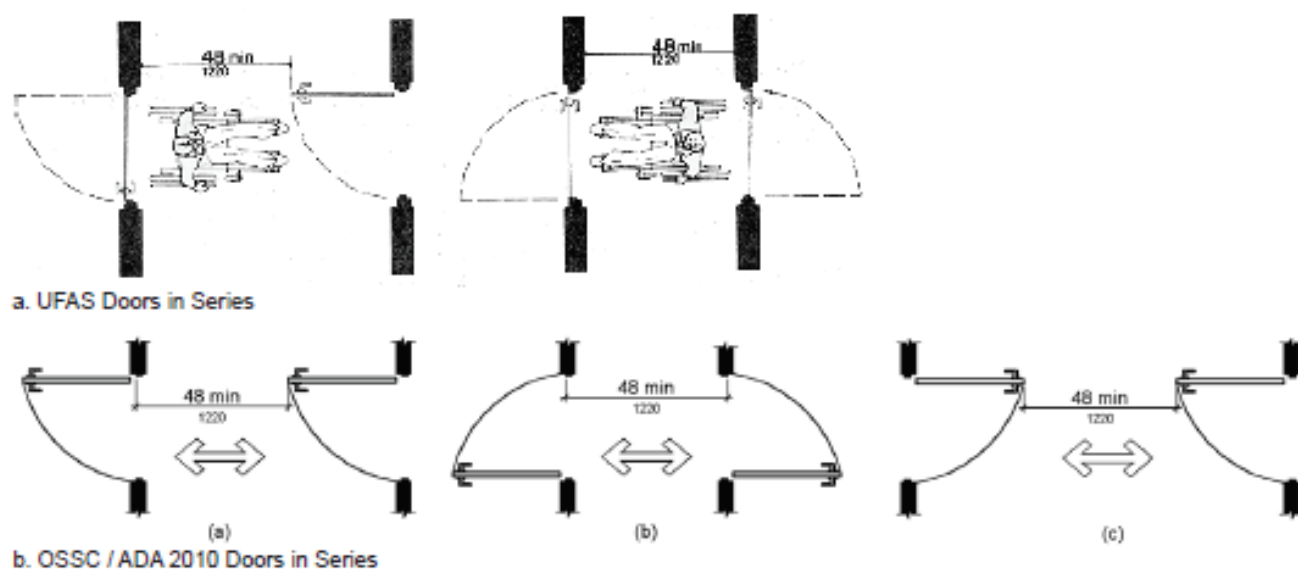

a. UFAS Doors in Series

b. OSSC / ADA 2010 Doors in Series

Diagram D: Doors in Series

UFAS 4.13.7 specifically states that doors in series must either swing in the same direction or in opposite directions. OSSC and ADA 2010 allow for two doors to open toward one another, provided that a space of 48 inches is provided between the swings. There is no definition in UFAS for how close doors must be, in order to be considered in series, so it is easy to see why later standards would eliminate this clause. A strict reading of UFAS would say that two doors 100 feet apart would not be allowed to open toward one another. At this point, the doors would have no perceivable connection.

a. Sample UFAS WC Location Diagram

b. Sample FHAG WC Location Diagram

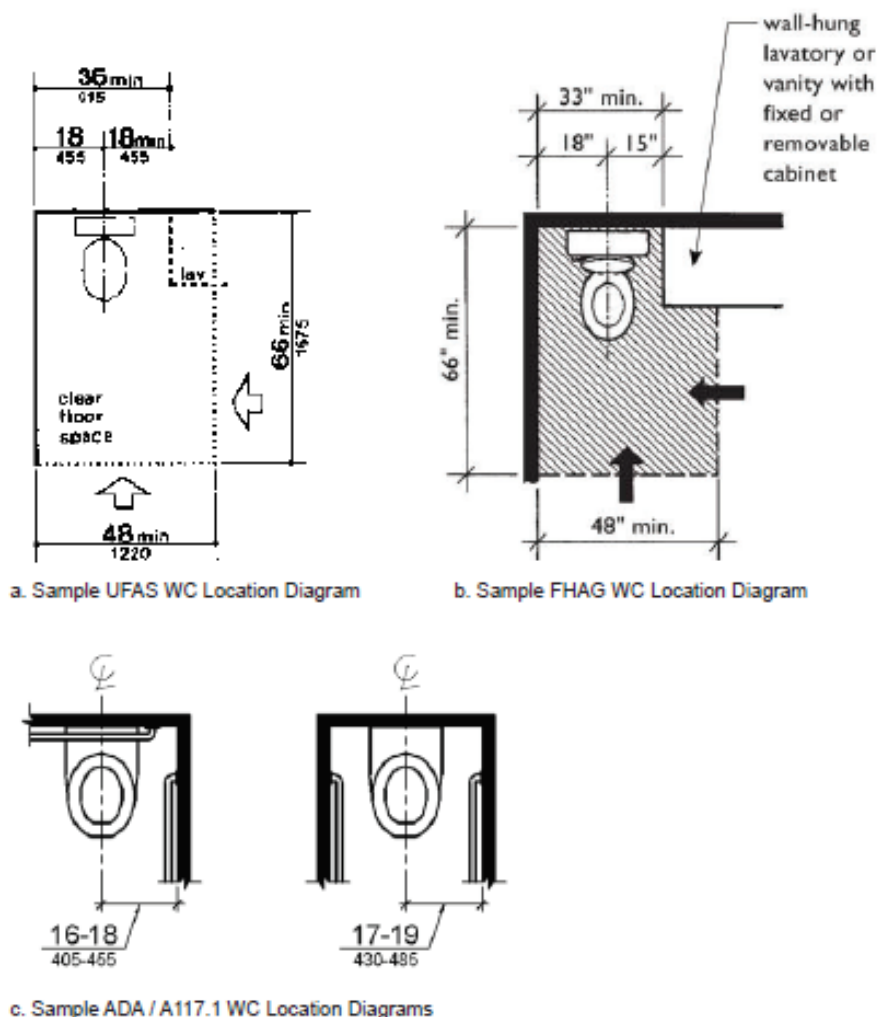c. Sample ADA / A117.1 WC Location Diagrams

Diagram E: Water Closet Location Diagram Samples

The only major distinction we have found between the technical requirements of the codes is in the water closet location dimensions. Earlier codes like UFAS and FHAG, do not accommodate building tolerances. The water closet centerline must be located exactly 18" from the wall. Later codes, such as ADA 2010 and A117.1-2009 provide a small range of distances in order to accommodate construction tolerance. It is a minor distinction with enormous consequences. HUD has officially adopted IBC as an acceptable alternative FHAG and therefore this problem is eliminated on non-federally funded buildings. However, UFAS compliance may still be technically required on some federally funded buildings, though in practice the standard has long since been superseded by more recent accessibility standards.
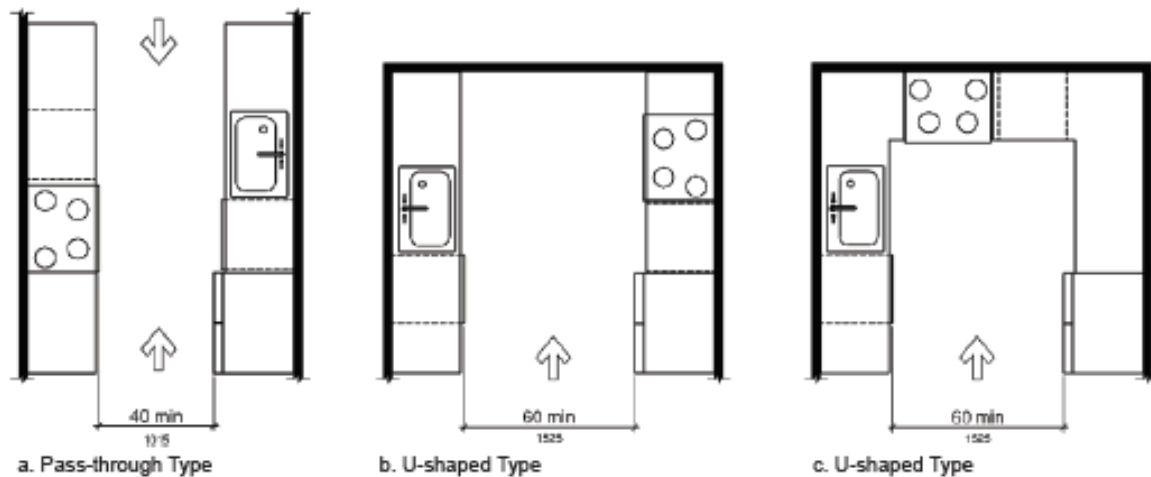
a. Pass-through Type   b. U-shaped Type   c. U-shaped Type

Diagram F: ADA Kitchen Standards, From ADA 2010 Guidelines

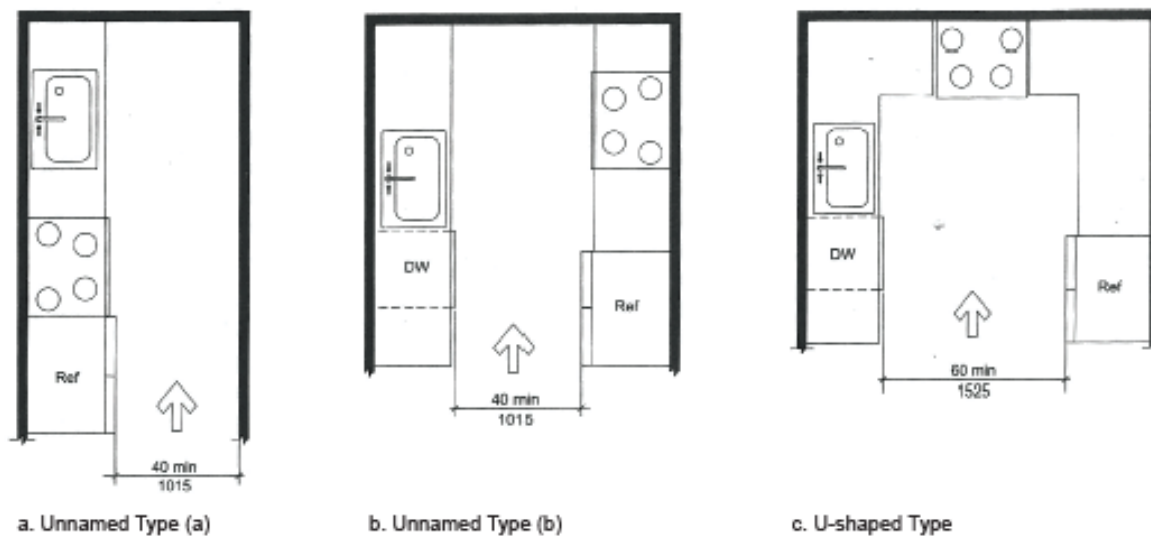a. Unnamed Type (a)   b. Unnamed Type (b)   c. U-shaped Type

Diagram G: A117.1 Type B Unit Kitchen, From ICC A117.1-2009

This is not so much a discrepancy as a note of warning. ADA 2010 and Type A unit kitchens per A117.1 use U-shaped to describe any kitchen without an outlet, while Type B unit kitchens are only considered U-shaped when cabinets are on three sides. This is important because U-shaped kitchens require a 60 inches minimum clearance between cabinets, counter tops, appliances, or walls, excluding hardware.

Conclusion

While there is inherent complexity to navigating detailed code requirements, findings of strong alignment and limited divergence among the four (4) documents analyzed, allowed us to conclude that mis-perception rather than actual complexity is a key factor in perceived risks for increased project costs and development timelines associated with accessibility code compliance. Improved transparency and resources that focus on navigating these limited disparities have the potential to obviate third-party verifiers or specialty code consultants required above contracts for design services, and to prevent extensions in contract time.

The State of Oregon, by remaining relatively current as to which IBC version they are adopting in OSSC, has made ensuring a compliant building relatively straight forward. For any technical requirement -- definitions, sizes, clearances, heights, etc. -- one should simply follow current OSSC and A117.1.[*] This is already required for all buildings within the State of Oregon. This also means that the authority having jurisdiction would be reviewing for compliance with these requirements; however it is not best practice to rely on this review to detect errors or noncompliance, and they are not liable to do so.

For projects with funding requiring compliance with various federal regulations, scoping -- the types and number of units required -- may not be clarified within OSSC. In R-2 (multi-family) residential buildings, all units along an accessible route should be designed to Type B standards, and all routes must be accessible when an elevator is provided. The number of Type A units may vary depending on your funding source. A default assumption of 2% by Oregon state law and 5% for federal funding may be used, but this must be verified on a project-by-project basis: different funding sources may carry different requirements.

The complex and overlapping history and evolution of these documents has led to widespread confusion for design and construction professionals. This research has shown through a broad assessment that this confusion is largely rooted in historic divergences that no longer exist, and provides a starting point from which to develop resources for accessibility code compliance.

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[*] This is a generalization, and is not intended to suggest that this may replace review of all applicable regulations and code. Standard Professional Care should be followed to ensure code compliance.

Appendix L – Recommendations re: Age-Friendly Portland & Multnomah County initiative

June 18, 2019

Recommendations re: Age-Friendly Portland & Multnomah County initiative

The Advisory Council for an Age-Friendly Portland and Multnomah County met on June 18, 2019, to discuss the future directions of Age-Friendly Portland and Multnomah County efforts. In expectation that the City of Portland, via the Bureau of Planning and Sustainability, hires a person to fill the Age-Friendly City Government position, we offer the following recommendations:

- **Maintain Current Structure of Advisory Council**: We strongly suggest the City of Portland (and Multnomah County) allow operations of the Advisory Council for an Age-Friendly Portland and Multnomah County as an advisory body outside of local government. The Advisory Council should be staffed by the new City of Portland hire (e.g., attend meetings, discuss relevant municipal issues), but membership and coordination of the Council should adhere to the Charter for the Age-Friendly Advisory Council of Portland and Multnomah County.[15] In particular, we suggest the chair of the Advisory Council should be an external chair who is not employed as the City of Portland's Age-Friendly City Government staff person. Furthermore, the Advisory Council will meet in summer, 2019, to discuss current members, "who is missing from the Council," needed changes to the Charter, and next steps with respect to composition and operations of the Advisory Council.

- **Advancing Equity across the Generations**: We understand that using an equity lens in Portland and Multnomah County starts with and utilizes a racial/ethnic lens; also, the Council understands that race, ethnicity, and disability are the core areas of focus for City and County-based equity work. The Advisory Council embraces this approach and suggests that local and state governments consider the intersections between age and other individual and groups characteristics, including, but not limited to: one's race or ethnicity, abilities/ disabilities, socioeconomic status, sexual orientation/identity, geography, and/or gender. Additionally, the Advisory Council suggests the new City Age-Friendly staff person learn about equity approaches from the Bureau of Planning and Sustainability's equity lead, the Office of Equity and Human Rights, and Multnomah County; with respect to Multnomah County, it has set a precedent with respect to equity-based contracting, workforce development, and community needs assessment. Specific attention can and should be given to efforts around public health and community-

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[15] Charter for the Advisory Council for an Age-Friendly Portland & Multnomah County. Retrieved from: agefriendlyportland.org/sites/agefriendlyportland.org/files/docs/AFAdvisoryCouncilCharter_8-20-15.pdf.

powered change, SUN Schools, intergenerational and diverse workforce practices, trauma-informed care, and the City-County Joint Office of Homeless Services.

- **Website: agefriendlyportland.org:** In 2016-17 the City of Portland, as part of a Special Appropriations grant, provided seed funding to launch the Age-Friendly Portland and Multnomah County website (agefriendlyportland.org). The website is functional and contains important information about the Advisory Council, Committees, volunteer opportunities, and more. The Advisory Council suggests that the City of Portland consider providing financial support to the operations of the website in order to facilitate external outreach and knowledge pertaining to the age-friendly initiative. Additionally, the Advisory Council suggests that the City should explore the acquisition of the agefriendlyportland.org domain, current owned by Elders in Action.

- **Toward an Age-Friendly Oregon**: On June 3, 2019, Oregon Governor Kate Brown proclaimed the day as Age-Friendly Oregon Day saying that she supports "initiatives and opportunities for communities to engage in the National Network of Age Friendly Cities."[16] The Advisory Council for an Age-Friendly Portland and Multnomah County suggests that the new City of Portland Age-Friendly hire work with the State of Oregon and other Oregon communities to advance an age-friendly state and to consider synergies with Age-Friendly Public Health and Age-Friendly Heath Systems efforts.

Sincerely,

Advisory Council for an Age-Friendly Portland and Multnomah County

CC:

AARP Oregon
City of Portland Bureau of Planning and Sustainability
City of Portland Office of Commissioner Nick Fish
City of Portland Office of Mayor Ted Wheeler
Asian Health & Services Center
Multnomah County Aging, Disability & Veterans Services Division
Portland State University Institute on Aging
Venture Portland

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[16] AARP Oregon (2019). *Governor Declares June 3 Age Friendly Oregon Day.* Retrieved from: https://states.aarp.org/oregon/governor-declares-june-3-age-friendly-portland-day