

A COMMUNITY VISION FOR AGING IN LAKE OSWEGO



REPORT ON THE
CITY OF LAKE OSWEGO 50+ COMMUNITY DIALOGUES



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With assistance from

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The Executive Summary, Comprehensive Report and Appendix from the Lake Oswego 50+ Community Dialogues can be found at <http://www.ci.oswego.or.us/> or by calling the City of Lake Oswego at 503-635-0270.

EXECUTIVE SUMMARY

BACKGROUND

Over the last fifty years, the City of Lake Oswego grew as a community of young families fueled by the demographic wave of baby boomers. By the year 2000, 21% of the Lake Oswego population was over the age of 55, and another 21% of the population was between the ages of 45 and 54. Today the leading edge of that huge demographic group has turned 60 years old. This new aging population is expected to affect public life in many ways including: economics, politics, health care, issues related to infrastructure including housing and transportation, and social involvement.¹

While demography is not destiny, it is clear that aging baby boomers will challenge and change what previous generations have come to expect from the later years of their lives. Having such a large percentage of the population within this growing demographic group calls for a city to better understand how its citizens over the age of 50 view the next 20-30 years of their lives. To meet the new opportunities and challenges of aging, baby boomers will likely redesign how and what services are delivered to support them. What communities do now will lay the foundation for what services their citizens have when members of the baby boom generation enter their seventies and eighties in the next 10 to 20 years.

The population over the age of 85 also continues to grow. In 2000, this group was projected to increase at the fastest rate of any age group nationally. This growth will also create new challenges for the city. Lake Oswego may need to provide new or expanded services that help support independent living for these residents. Communities around the country face the challenge of addressing the increasing demand for services caused by an aging population while understanding the expectations and desires of changing demographic groups. This challenge is also an opportunity for forging new ways to engage the community and tap their creativity to develop new programs or services.

The Lake Oswego Adult Community Center has been the cornerstone of service delivery in the community for residents 50 years and over since 1970. The Adult Community Center offers a broad array of recreational activities and social services, supporting people's desires to lead healthy, independent, and productive lives.



As the Lake Oswego population has aged, demand for services has steadily increased. The Adult Community Center has experienced a dramatic increase in demand for social services and a shift in the types of programs and activities residents participate in. As the baby boomer generation continues to age it will be critical to continue to offer many current services while at the same time embracing the opportunity to create new and innovative models to meet the future needs of residents.

The demographic shift and expectations of residents will call for the facilities and programming offered in the community to evolve to meet their changing needs. The challenge for the City of Lake Oswego is to strengthen the programming for those currently using the Adult Community Center while responding to changing community needs to create new and different offerings that serve residents at different stages of their lives.

While federal and state funding is decreasing for many older adult social services, communities around the country are responding with the development of innovative models to help citizens maintain their independence, address their changing needs, and support their connection to the community.

In January 2005, the Lake Oswego City Council identified the importance of better understanding the needs and expectations of residents over 50 as one of their top goals. Councilors understood that the very nature of aging and retirement is changing. How the residents of Lake Oswego confront the new challenges and opportunities of aging and the changing needs of the community will be critical to the continuing success of the city. The City Council also recognized that people are the community's greatest asset and wanted to harness this community capacity as part of the assessment process to help develop solutions appropriate to Lake Oswego.

assessment goals In September 2005, the City retained Lincoln Crow Strategic Communications to conduct a community-wide assessment to determine the needs of residents age 50 and over. The goals of this assessment were to:

- ♦ Identify the issues, concerns, and needs of Lake Oswego's 50+ population, including understanding the desires, expectations, and needs of people nearing or entering retirement age.
- ♦ Explore factors that play a role in aging successfully, such as health, wellness, and living meaningful and purposeful lives.
- ♦ Probe the 50+ population's awareness of and satisfaction with existing services and programs, as well as identify gaps in service.
- ♦ Evaluate the stability of future funding and the potential impact on future social service delivery at the Adult Community Center.
- ♦ Determine the city's role in meeting current and future needs.

assessment process A “community dialogue” process was chosen as the most effective means for engaging and mobilizing Lake Oswego community members. Partnering with Civic Ventures and Portland State University, Lincoln Crow developed a community-based approach to help the city:

- ♦ Create a strong network of invested experts in aging from local, regional, and state resources,
- ♦ Recruit and develop a large base of committed and involved community members, and
- ♦ Provide options for the city to assess in meeting citizens’ future needs.



The process is based on the belief that individuals have a strong stake in creating the future of their community and a desire to participate in shaping that future. It was developed to engage the community in a dialogue that supports appropriate framing to work through issues and evaluate potential solutions. Through dialogue, individuals bring their internal assumptions to the table and together form better public judgments that contribute to sound public policy. The dialogue was designed to:

- ♦ Better understand the challenges and opportunities residents face,
- ♦ Create a vision of what a vibrant community would be for them as they age, and
- ♦ Define key actions that might make this vision a reality.

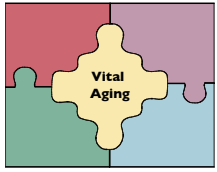
Through active dialogue, participants discussed issues of aging: how they view factors that play a role in aging successfully; their needs, desires, and concerns nearing retirement; and the types of services which might be needed as they or family members age. The Lake Oswego 50+ Community Dialogues allowed more than 340 community members to discuss these questions and to begin articulating a new vision for aging in the community.

To supplement the dialogues, a written survey instrument was developed to collect demographic information and help assess issues and opportunities facing the community. During the dialogues, 185 people completed and turned in a written survey.

The dialogue findings and recommendations provide a significant opportunity for Lake Oswego to create the community of the future, addressing the needs of residents along their entire life span.

Throughout this report, when the term “Lake Oswego” is used, we are referring to the community as a whole – government, citizens, business, and organizations.

PROMINENT THEMES



Four prominent themes emerged from the 50+ Community Dialogues. While the dialogues covered a wide range of opportunities and challenges, these themes group the most commonly discussed topics in categories that describe key aspirations of the participants. These themes represent participants' attitudes, beliefs and desires for their personal lives, for their families, and for their community as they age.²



Lake Oswego residents want to age in place and create a community where they can maintain their independence with available and appropriate housing, increased mobility, and effective services and support.

- ♦ Housing – Many people over age 65, burdened by high housing costs and living on fixed incomes, are in need of affordable housing that is safe and easy to maintain. This is particularly true for those who live alone or have low incomes. Many residents anticipate downsizing their home and want help developing affordable, accessible smaller homes near transportation and shopping. Simple home modifications can also make their current homes more supportive and safe.
- ♦ Transportation – Mobility is critical to independence and to staying connected with the community. Communities thrive when they take action to keep residents connected to the families, friends and activities that bring meaning to their lives. Communities have a stake in helping to ensure that residents can remain mobile once they limit or stop driving. Residents want accessible transportation and an increased ability to walk in safety.
- ♦ Services and Support – As residents choose to remain in their own homes, linking them to appropriate supportive services will help them to age in place. The City has already experienced a significant increase in use of services, and it is expected that this will continue as the population ages. Residents also want to explore new models of service provision, including virtual support networks to supplement traditional service delivery. In addition, families confront basic needs when they care for each other across generations. Participants in the dialogues seek support in addressing the challenges of caregiving and dealing with a complex and fragmented health care environment.



Lake Oswego residents want to create mechanisms to help build a community infrastructure that brings people together. Residents want members of every generation to be able to remain connected to other generations living in Lake Oswego. They want the focus and vision of creating community to be on creating a “community for all ages”.

- ♦ Connected Community – Social interactions are critical to creating community. Residents want the opportunity to meet each other at the neighborhood level and

want to create new venues for connection. Community infrastructure providing neutral spaces for people to meet is an important factor in creating community and neighborhood connections.

- ♦ Intergenerational Connections – To encourage interaction among all age groups and to avoid segregation that can isolate generations, residents want planning and policy development that recognizes the needs of individuals along the entire life span.

Lake Oswego residents discussed the need for lifelong learning and life planning programs offering training to retool their skills in order to strengthen their community and achieve personal fulfillment. Residents want the community to encourage civic engagement in order to better mobilize the skills and talents of residents while also helping to create more opportunities for meaningful service.



- ♦ Life Planning and Lifelong Learning – Participants have as many questions as answers about what they want to do after they reach traditional retirement age. However, what many do know is that they want to continue learning, growing, and contributing to the community.
- ♦ Meaningful Service – Meaningful service through paid and unpaid opportunities is a primary value for dialogue participants who want to use the skills they have developed over the years as a resource for the community to solve community problems.

To support healthy aging, residents want to promote wellness in the community. They want to create mechanisms to support citizens in maintaining a healthy life and confronting the often-complex health issues related to aging. Physical fitness, mental well-being and health care were all important aspects of healthy aging to residents.



- ♦ Physical Fitness and Mental Well-Being – Active lifestyles and lifelong learning help people stay more vital and engaged. Residents want more recreational and cultural opportunities offered locally that match their interests. Residents also want activities that are multigenerational, not segregated by age, with expanded programming during weeknight and weekend hours.
- ♦ Health Care – Health care is a major concern of all Americans. Dialogue participants want more educational information about health issues and help in accessing care.

KEY RECOMMENDATIONS

Following the completion of the dialogues, six key recommendations were formulated to support the community's vision and allow the City of Lake Oswego to better evaluate possible options for action. The recommendations are based upon analysis of the dialogues and written survey results, a review of the current Lake Oswego services and programs for 50+ residents, an assessment of current and potential aging resources available to the city, and the ideas and suggestions of citizen volunteers and professional experts. Community best practice models and references from around the country were also used to develop the key recommendations.



Task force teams made up of community members, professional experts, and city staff reviewed the dialogue findings and articulated potential actions; consultants then subjected all the findings to the criteria. Seven criteria for assessing needs, resources, innovation, and community support were utilized to develop and prioritize the recommendations.³ The recommendations are a result of their efforts and recognize the principle that success depends on many people and organizations working together.⁴

The key recommendations reflect current needs and build on strengths in the community. They allow for planning over the longer term to address the changing needs and expectations of residents for this stage in their lives. And they focus on building partnerships, identifying cost-effective methods of meeting community needs, and avoiding duplication of services.

Recommendation 1

Support and implement the 'Lake Oswego Affordable Housing Report' (Adopted July 2005) and develop model programs to provide housing options for residents.

- ♦ Assess and implement measures such as density bonuses⁵, tax incentives, and zoning changes to maintain and increase affordable housing.
- ♦ Evaluate the addition of a 'home sharing' program as a means to maintain independence and increase housing affordability in the community.
- ♦ Consider models of senior co-housing and related zoning to support its development.
- ♦ Investigate limits on conversion of rental units and/or require a relocation referral system to help residents displaced due to conversion of existing rental units.
- ♦ Evaluate the impact of increased property tax on residents living on a fixed income when considering community development projects.
- ♦ Provide further education about tax and mortgage programs to assist residents living on a fixed income.

Recommendation 2

Support and implement the ‘Lake Oswego Elderly & Disabled Special Needs Transportation Study Recommendations’ (Adopted December 2005) and encourage additional transportation options.

- ✦ Continue to work with Tri-Met and Tri-Met Lift to improve bus schedules, services, and accommodations.
- ✦ Evaluate and implement a pilot community shuttle.
- ✦ Expand the Lake Oswego Adult Community Center volunteer-based driver program by increasing the number of volunteer drivers to meet service needs.
- ✦ Consider alternative volunteer-based driver programs.

Recommendation 3

Evaluate programming and facility requirements to meet the current and future social service needs of residents.

- ✦ Evaluate redesign of programming and related facilities to appeal to the expectations and desires of the changing demographic represented by the baby boomer generation.
- ✦ Evaluate a variety of service models to augment existing programs and services offered at the Adult Community Center to increase options available to meet the needs of residents.
 - Evaluate partnerships with local community-based volunteer service programs to meet the needs of daily living for residents.
 - Evaluate service models that are resident-developed, fee-based, and self-supporting.
- ✦ Investigate outreach models and staffing requirements to increase the ability of Adult Community Center staff to work with community and neighborhood organizations to connect isolated residents with existing services.
- ✦ Evaluate programming and related facility and staffing requirements to provide increased support for caregivers through enhanced respite care, community outreach and support groups.
- ✦ Develop an ongoing and more comprehensive marketing plan for programs and services in the community.

Recommendation 4

Continue to increase opportunities for community and intergenerational connection.

- ✦ Continue to identify and support the development of more ‘third place’ spaces in public planning to create opportunities for increased community connection.

- ✦ Consider potential for intergenerational connection when developing city policies and guidelines.
- ✦ Provide training to help community leaders learn how to assess and create opportunities for intergenerational connection.
- ✦ Create structured opportunities for ongoing intergenerational public dialogue to further develop community solutions to community-identified issues.

Recommendation 5

Provide additional life planning and meaningful paid and unpaid service opportunities.

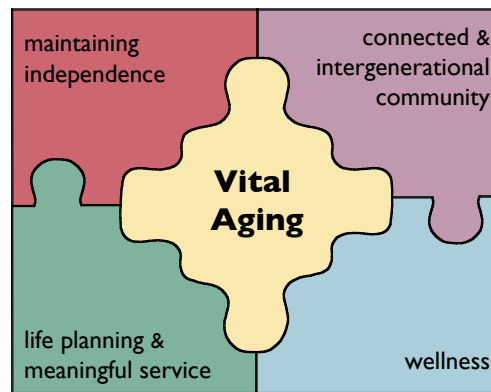
- ✦ Develop a life planning and meaningful service program to support people's expectations and desires nearing retirement.
- ✦ Create a coordinated effort among community organizations, schools, churches, and the city to develop meaningful volunteer opportunities that match civic interests to civic need.
- ✦ Evaluate hiring a citywide meaningful service coordinator to match civic interests to civic need community-wide.
- ✦ Consider adding a volunteer coordinator at the Adult Community Center to expand meaningful service opportunities to meet increasing service needs.
- ✦ Brand and broadly advertise the resulting Life Planning and Meaningful Services Program to the community.

Recommendation 6

Evaluate and develop partnerships to support healthy aging.

- ✦ Evaluate and identify opportunities to increase cultural, educational, recreational, and health programming to support the physical and mental well-being of residents.
- ✦ Enhance cultural, educational, recreational, and health programming to appeal to baby boomers.
- ✦ Evaluate the ability of existing facilities to adequately meet these enhanced needs.
- ✦ Refine and make available a community resource guide.
- ✦ Educate the community about existing resources to assist residents in making choices about health care and services, including information about Oregon's statewide web-based resource www.networkofcare.org and the 211 information telephone line.
- ✦ Work with local health care providers to evaluate the feasibility of a local clinic to provide increased health care access for an aging population.

SUMMARY



The key recommendations offer potential solutions to support the community's vision of vital aging, each recommendation providing a piece to an intricate puzzle.

By applying proven community outreach techniques to the unique circumstances and goals of Lake Oswego, residents showed what active civic participation can do. The significant support for and participation in the 50+ Community Dialogues demonstrates that community residents are poised to participate in the development of local solutions. The participants in the 50+ Community Dialogues leveraged limited resources and utilized community strengths to implement this community assessment. In the process they enhanced the community capacity for addressing their population's needs and deploying their assets, unleashing community creative energy.

The 50+ Community Dialogues are a critical first step in creating a new vision for vital aging in the city. The themes and recommendations that emerged from the 50+ Community Dialogues can inform the City Council in determining future priorities and help fulfill the community's expressed desire to participate in the community planning process.

The recommendations and potential solutions presented in this report allow the city to play a variety of roles; as a direct service provider or as a facilitator, working with both business and community groups, using both fee-based and volunteer systems; and continuing to encourage citizens to participate in charting a course toward a community where people can age with independence and opportunity.

The comprehensive report provides more information on the current situation in the community, projected needs and expressed desires of residents, and potential solutions to build a community vision of vital aging in Lake Oswego.

A copy of the executive summary and comprehensive report from the Lake Oswego 50+ Community Dialogues can be found at <http://www.ci.oswego.or.us/> or by calling the City of Lake Oswego at 503-635-0270.