

Attachment A: Public Testimony - October 18 through November 3, 2011

Date Received	Comment Number	Database Number	Letter (L) Email (E)	Author's Name	Address
10/25/2011	1	4431	E	Chuck Martin	944 SE SELLWOOD BLVD PORTLAND OR
10/24/2011	2	4432	E	Ross Swanson	5812 SE 21ST AVE PORTLAND OR 97202-5232
10/28/2011	3	4433	E	Jason Barnstead-Long	8904 N PORTSMOUTH AVE PORTLAND OR 97206
10/31/2011	4	4434	E	Jay Bloom	3122 NE SCHUYLER ST PORTLAND OR 97212
10/31/2011	5	4435	E	Alice Gustafson	1210 NE 152ND AVE PORTLAND OR 97230

From: Chuck Martin [mailto:chuckmartin1@comcast.net]
Sent: Tuesday, October 25, 2011 4:52 PM
To: Dornan, Chris
Subject: RE: Portland Plan Testimony

You have my consent. My address is 944 SE Sellwood Blvd., Portland, OR

ChuckMartin

From: Dornan, Chris [mailto:Chris.Dornan@portlandoregon.gov]
Sent: Tuesday, October 25, 2011 2:58 PM
To: 'chuckmartin1@comcast.net'
Subject: RE: Portland Plan Testimony

Hi Chuck,

Thank you for your email!

If you would like your suggestions considered as official Portland Plan testimony, please send me a reply with 1) your consent, and 2) your mailing address. We need both of these to formally accept your email into the public record.

Let me know if you have further questions, thanks.

Regards,

Chris Dornan

Bureau of Planning and Sustainability
503-823-6833
chris.dornan@portlandoregon.gov

From: Chuck Martin [mailto:chuckmartin1@comcast.net]
Sent: Saturday, October 22, 2011 3:05 PM
To: Planning and Sustainability Commission
Subject: Number of Jobs in Portland Plan

In the data detail on jobs, I found the data that shows that Sellwood/Moreland/Brooklyn lost 4,078 jobs between 2000-2008. This was the most jobs lost in any of the 24 neighborhood groupings.

We just do not see that in the Sellwood Westmoreland business district. Was there a large job loss in Brooklyn that is driving this figure?

Chuck Martin
Executive Director
Sellwood Westmoreland Business Alliance

From: Chuck Martin [mailto:chuckmartin1@comcast.net]
Sent: Saturday, October 22, 2011 3:00 PM

To: Planning and Sustainability Commission
Subject: Must be an error!

On page 114 of the full plan, the Sellwood-Moreland-Brooklyn neighborhood is rated a "6" on Economic Prosperity with segment ratings of 10,10,0,and 7 on Page 115 Woodstock is rated a n "8" with individual ratings on Page 115 of 10. 9, 0 and 7.

We believe that the "^" rating is in error, and should be an "8"

Chuck Martin
Executive Director
Sellwood Westmoreland Business Alliance.

From: Chuck Martin [mailto:chuckmartin1@comcast.net]
Sent: Saturday, October 22, 2011 2:27 PM
To: Planning and Sustainability Commission
Subject: Where to find data referenced

The draft plan says that 17 out of 23 neighborhood market areas lost jobs in the 2000-2008 time frame. Where do we find that specific data?

Chuck martin
Executive Director
Sellwood Westmoreland Business Alliance
South Portland Business Association

From: Chuck Martin [mailto:chuckmartin1@comcast.net]
Sent: Thursday, October 20, 2011 12:59 PM
To: Planning and Sustainability Commission
Subject: Portland Plan Testimony

On page 14, Goal 7, the Plan states that 23% of workers 16 and older take transit or active transportation to work. Recently published data from the US Census Bureau refutes this figure. I believe that they state that only 6 % of Portlanders ride public transit to work. This was published in the Oregonian about 6 weeks ago. The data did support the stats on bicycle ridership.

On page 15, Goal 9, has anyone considered using walkscore.com as the measurement tool? Our business association Sellwood Westmoreland Business alliance has found their data relevant. Their one fault is that they measure by GPS, which means they go in straight lines and over waterways, rail lines ,etc. Distance measurements by Mapquest would be more accurate. They have been trying to improve their system, so may have changed that by now.

Chuck Martin
Executive Director
Sellwood westmoreland Business Alliance

From: ross swanson [mailto:rossswan@yahoo.com]
Sent: Monday, October 24, 2011 12:50 PM
To: Planning and Sustainability Commission
Subject: Portland Plan Testimony

Thanks for the opportunity to comment on the plan. My comments are specific to the Sellwood-Moreland area and transportation and land-use

I like that there is some thoughts to the Tacoma Station - however those plans are at 60% engineering and will be built with-in 4 years from now, so I hardly think it is relevant to a longer term plan like this one. I say this as that leaves no vision for the neighborhood to work with until the next plan is done. I would recommend the following additions:

1) Pursuit of the Harold Street station for PMLR. Thresholds for when this would be considered have been developed with the neighborhood and TriMet. These items should be noted in the plan and the city should have a path for pursuit. This stop should be considered with AND without the concept of a ped bridge connection to Reed College. The Reedway bridge proposal to Reed College is expensive, well thought out, grand but expensive. However, this is where these ideas should fall.

I would offer up an At-grade McGloughlin crossing to the Harold Station as a second option - as we should plan to be flexible with an unknown economic outlook. At a minimum, this would provide a Rail connection for the north end of the neighborhood.

2) Pursuit of high quality private development in-fill adjacent to the proposed Harold Street station. This area has already been rezoned with the anticipation of a light rail stop but has not lived up to the promise. It seems like we rezoned and walked away. That is falling into a cliché of how the citizens view government and build distrust.

4) Pursuit of Oaks Bottom revitalization for not only habitat but also a model for environmental education. It's hard to believe that this asset is in a city of our size and yet is still has not had a significant effort to showcase it's value.

Thanks again on the Planning effort. It looks like a lot of good work. Just put in my suggestions - especially about Harold Street - and I will be happy.

Ross Swanson
Landscape Architect / Project Manager
5812 SE 21st Ave.
Portland, OR

October 28, 2011

Re: Proposed drafts of the Portland Plan Report and the Summary

Portland city staff and PSC members,

The following are my comments after going over and reading the drafts of the Portland Plan Report and the Summary. Thank you again for your efforts.

- I read/skimmed through the Summary & Report and found these:

Page 8 of Summary; 2nd para: "This action plan can easily be adapted to fit..." In the same section of the Report (p. 9), the like sentence says "adopted" instead of "adapted". If I understand the sentence correctly it should be "adapted".

Page 29 of Summary; 2nd para; 1st sentence: I think the second "will" should be a "to", and "updated data" should be "updates data". I looked and it is that way in the Report (p.118)

- In going through the Report and Summary I came up with a number of formatting suggestions that I feel would help in the readability and acceptance of the documents. I think, if they are of value to you, that you would want them before the dates of the public hearings.
 1. Especially for the Summary, make the 12 Measure of Success, the Framework for Equity, and the 3 Integrated Strategies stand out more (larger, bolder, different fonts). And if possible, put them at least at the smaller scale on one of the first open pages (before or on the first page of the Summary for example). People tend to want steps and results, not history, explanations and data, and those are great diagrams for that. They should also continue to be reinforced through marketing to keep people on track (the website, signs, handouts, etc.). I said "especially" for the Summary (black & white copy) because the lack of color really does affect the readability of the information, and that these are important, especially in the document for those who might not have as much interest, time, or understanding as those who would read the full Report.
 2. While the Report has a good, visible table of contents at the beginning, the Summary does not, it's stuck in at the bottom of page seven. With questions of "What will be done" and "Who will do it" I found it to be difficult to find those by just skimming through (or not having too much understanding of the terms). I did find the actions and policies, and the data at the beginning of the Implementation section, eventually. If it is possible to make those stand out more and to move the table of contents to a better spot I think that would help a lot.
 3. I found very little on accountability (for the City and partners). I thought we were trying to promote accountability, especially due to issues with development events of the past. If it's in there please make it much more noticeable. *(In later reading I saw that there is more on accountability in the Report (pp.11-14, 84, 117), but most of that is not in the Summary where it would be just as, if not more, valuable.)*
 4. I also found very little on the need and desire for as wide a variety as possible of Portlanders to continue and increase their involvement with community affairs and development; to continue this great movement and for sustainability's sake.
- In line with some comments at the last Community Involvement Committee meeting – that the “Local Actions” section (Appendix B of the Report) would do more harm than good, dividing neighborhoods and communities against each other – pages 34-53 of the Summary should be cut. While arguments might be made to leaving it in the full Report, those pages make up over a third of the Summary. Taking them out would help reduce the size of the Summary, and also make room for the “Framework for Equity” pages 11-14 of the Report.

Kind regards,
Jason Barnstead-Long
8904 N Portsmouth Ave
Portland, OR 97206

From: Jay Bloom [mailto:jay@bloomanew.org]
Sent: Monday, October 31, 2011 6:57 PM
To: Stein, Deborah
Subject: RE: Announcing the release of The Portland Plan - Proposed Draft

3122 NE Schuyler St Portland OR 97212
Attached is more information you may find helpful.
Thanks
Jay

"To be truly radical is make hope possible rather than despair convincing." Raymond Williams

Jay C. Bloom
www.bloomanew.com
503-381-2649
808-753-4331

[Some Boomers 'retire' to jobs that allow them to help others](#)

From: Stein, Deborah [mailto:Deborah.Stein@portlandoregon.gov]
Sent: Monday, October 31, 2011 3:50 PM
To: 'Jay Bloom'
Subject: RE: Announcing the release of The Portland Plan - Proposed Draft

Thanks Jay. Would you like me to submit this email into the formal record for the Portland Plan? I would be happy to do that - I will just need a mailing address in addition to your email address (which I have below). If you have any additional comments you would like to submit, either overarching comments or specific details, we would welcome them.

Thanks, and I looking forward to continuing the conversation about addressing the needs and opportunities for older adults in both this plan and the Comprehensive Plan update which will follow.

Deborah

Deborah Stein
District Planning Manager
Portland Bureau of Planning & Sustainability
503.823.6991
deborah.stein@portlandoregon.gov

From: Jay Bloom [mailto:jay@bloomanew.org]
Sent: Sunday, October 30, 2011 9:31 PM
To: Stein, Deborah; nealm@pdx.edu; aland@pdx.edu; Hersen, Vicki; phuff@terwilligerplaza.com; JCohen@aarp.org; donitasf@nayapdx.org; Hussein, Sara; Libby, Lisa; Hocker Jr, George; jmullin@oregonlawcenter.org; jay@bloomanew.org; Islaughter@ulpdx.org; lauretta410@gmail.com; aland@pdx.edu
Subject: RE: Announcing the release of The Portland Plan - Proposed Draft

Thanks for sharing. However I do believe a separate section should have been broken out about aging and especially the opportunities for vital aging since people 50 and older represent over 25% of the population. Minimally we should emphasize more intergenerational strategies.

Here are a couple of examples of other cities.

<http://www.denvergov.org/aging/AgeMattersInitiative/tabid/432447/Default.aspx>

<http://www.epa.gov/aging/bhc/awards/2010/index.html#Charlotte>

Jay

"To be truly radical is make hope possible rather than despair convincing." Raymond Williams

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OREGON: A State for the Ages

By Jay C. Bloom President/CEO Bloom Anew

Background:

Nearly 25% of all people who live in Oregon are age 50 or older with the overwhelming number of residents wanting to age in place.

Clearly this emerging scenario presents many challenges. Numerous advocates and older adult experts have been trying to get policy makers to be aware of the “**silver tsunami**” with the attending need for long term care and social supports. Groups such as AARP Oregon, Oregon Alliance of Retired Americans, the Area Agencies on Aging, two Governor’s Task Forces on long term care and many others continue to point out the growing gap between current and future needs and the resources that are currently allocated. Pressure to respond to these inevitable needs will only increase in the years ahead.

“We are pushed by pain until we are pulled by vision.” Rev. Michael Beckwith

Opportunities:

What about the opportunities of this scenario for Oregon? What is the value of this human resource given we are living longer and with more vitality than previous older generations? As Dr William Thomas says, “**What are old people for?**”

Older adults are often honored in our local communities. Can we do more than respect and honor our older adults? How could Oregon take advantage of this growing demographic? How could employers, the tourism industry, schools, nonprofits, developers and universities, health care organizations utilize and leverage this growing resource?

The boomer generation that is aging in Oregon will be the most educated, healthiest, and largest older population in state history. Although not all, many of these people will part of the most affluent generation the world has ever known. How can Oregon strategically utilize this human capital of talent, time and expertise to address the many challenges we face economically, socially, and in our schools?

Richard Florida, author of “Who’s Your City” and the “Rise of the Creative Class” told the **Greenlight Greater Portland (now Greater Portland Inc)** annual conference three years ago that Portland and Oregon are one of the few regions and States that are attracting talented people from all age groups. He noted that individuals tend to move at three major times in their lives. The first is when they are out of college, the second when they are starting their families and the third when a couple experiences an “empty nest.” So in addition to the aging in place Oregon is experiencing a growth of older adults who in their own way have decided to **finish well here.**

Economic Development case:

The following are some key facts that support the position that older adults can and should be part of our economic development strategies.

- Individuals 45 and older own 77% of the wealth in the United States and account for more than half of the nation's discretionary spending.
- More than 50% of the nation's discretionary spending is done by those 45 and older.
- Despite current high rates of unemployment, growing workforce shortages are expected over the next 20 years nationally and locally especially in the utility, health care, education, governmental and nonprofit sectors.
- The boomers are projected to be the healthiest, most educated and most affluent older population in human history.
- **Numerous national studies indicate that over 75% of boomers indicate they want or need to work in their later years either in paid and/or unpaid work.**

Older adults:

- Pay taxes and represent significant purchasing power
- Represent a growing workforce
- Have wisdom, expertise, experience and time for civic engagement
- Prefer intergenerational involvement opportunities and less age-segregated neighborhoods
- **According to the Kaufman Foundation, Americans 55 to 64 form small businesses at the highest rate of any age group**

How could Oregon take advantage of these trends as well as from some of its unique strengths and assets?

Oregon should embrace and leverage the opportunities its aging population offers. Oregon could be a state that not only honors older adults but could be a national model for **aging well, engaging older adults in work, lifelong learning, civic engagement and for the opportunities of intergenerational living.**

Researcher Mark Fagan of Jacksonville State University in Alabama reports in his book, "Retirement Development: A How to Guide," that a typical retired couple has the **same economic impact to a town as the attraction of 3.4 manufacturing jobs.**

In addition to the states of Arizona and Florida a number of other states such as North Carolina, Maryland, Tennessee, Mississippi and New Mexico have begun to develop **proactive economic development strategies and campaigns to recruit older adults** to come and move there because of the reasons cited above. Some states have set up special commissions and/or departments to actively pursue these opportunities.

Portland and Oregon have some special assets that give us unique opportunities to leverage our **natural environment, culture of civic engagement, significant health care capacity, public transportation, housing policies** and reputation for being an age-friendly state to attract, engage and retain older adults and to serve as a national if not international model.

Oregon and Portland stand out:

- Portland was the only American city to participate in the World Health Organization study of what makes an “Age-Friendly City.” (2007)
- Portland was identified as the **number one place to retire** by Sperling’s Best Places (2006)
- Portland was rated number two by AARP as a **place for older adults to live** (2005)
- Portland was rated number one in the nation for **access to the outdoors** (2007)
- Portland was rated number one as a **place to raise a child** (2005)
- Portland was rated one of the **best walking and biking cities** in America (2008)
- Portland was rated number two in US cities for **civic engagement** (2010)
- Multnomah County completed a nationally recognized **Task Force on Vital Aging report** (2008)
- National foundation Atlantic Philanthropies invested over a million dollars in the local initiative **Life by Design Northwest** a program sponsored by Portland Community College and in the Oregon Community Foundation early childhood initiative with older adults. (2006)
- Site Selection magazine released its inaugural sustainability rankings on July 8, 2010 placing **Oregon third** on its state list behind California (No.1) and Washington (No. 2). In the magazine's city list, the **Portland metro area placed second** behind the San Francisco Bay Area.

In the future, green and sustainable businesses will play a bigger role in the economy. Portland and Oregon are well poised to play a strong role in the green economy of the future. Older citizens have many skills that can support the green economy.

However Oregon invests now in the development of small businesses marketing and resources could be targeted to demonstrate how the State **values helping older adults start and support new businesses** including matching retired executives and managers who may want to mentor or serve as advisors to others who are starting new businesses. The State could draw down Department of Labor funds to more aggressively assist older workers find jobs.

Oregon’s employers could create model employment policies that would not only attract and retain older workers but be models for what an effective intergenerational workplace could be. Managing a multigenerational workforce is becoming one of the top diversity training challenges for employers. The **Chambers of Commerce, Oregon Business Council and Oregon Business Association** could lead this

effort. **Portland General Electric, CH2M Hill** and three national companies that have a presence the state, **CVS, Home Depot, and Starbucks** are already pursuing corporate recruiting and retention strategies to attract older workers and would gladly participate in a statewide effort.

Oregon's tourism industry could create a very aggressive effort to develop intergenerational experiences and market opportunities for grandparent/ grandchildren travel. This is an area that will surely grow in the future and Oregon could be the leader in this opportunity. It is an industry that will need to recruit and retain older adults as part of its core workforce strategy going forward why not use this inevitability for specifically helping target the older adult traveler. Increasingly the older adult wants a unique experience and what better opportunity to include one or more grandchildren in that trip. Intergenerational experiences could not only include the recreation variety but include learning and/or volunteer ones as well.

Oregon's community colleges and universities could become leaders in helping older adults to re career and stay in the workforce longer. Health care, education and the nonprofit sectors are just some of the top employers who will be looking for workers in the future. These same institutions could also become leaders in offering assistance in life planning and upgrading skills including offering and promoting **lifelong and/or intergenerational learning opportunities** for older adults. **Portland Community College's** encore gerontology project and the **University of Oregon's** Osher Life Long Learning Institute are just two excellent examples that could be strengthened and expanded.

Developing new housing options for an aging population will be a growth area throughout the United States. Given the desire for older adults to want to live directly or near other generations **Oregon is uniquely positioned to be a leader in developing and promoting a variety of intergenerational housing options** ranging from many different co housing models to shared housing between older adults and college students among others. **The Sheldon Cooperative and Bridge Meadows** are just two new examples that have recently emerged and other new construction models are being developed.

Many technology companies such as **Intel** and General Electric (Care Innovations) are investing in research and products on how technology can assist the aging world's population to be better able to age in place more effectively and participate more actively in their own aging well. The new national health care reform effort will also have dollars for piloting technology and aging as well. **Oregon has the opportunity of being an excellent beta site** similar to what Ireland and **Oregon Health Sciences University** currently are for Intel.

Social Capital case:

One of the most significant challenges still facing Oregon is its educational system. When asked where older adults would like to make a difference working with and for children's causes are the clear favorite choices. There are a number of potential roles for older adults to play in education both inside and

outside of schools ranging from teacher aides to mentors for children and even support for parents with infants.

Retired teachers and principals could be a great resource to use for training and supervising older adults who will need orientation and support as they experience new work cultures. The **Chalkboard Project, the Children's Institute, Stand for Children, Experience Corps and Cradle to Career** are organizations already deeply committed to improving education and early childhood initiatives and they could take the lead in investing in capacity building and demonstrating how to effectively leverage older adults both inside and outside of schools. Oregon Community Foundation along with Atlantic Philanthropies has funded a three year initiative pairing **Babies and Boomers**.

Oregon has a history that values volunteering and informally supporting each other. Oregon could also become a leader in leveraging older adults who want to make a difference in other areas of the community. Nonprofit organizations do great work in Oregon but they too are faced with an aging workforce, limited resources and growing needs and challenges. They are also likely to be called even more in the years ahead.

The governor of California created a cabinet level position titled **Secretary of Service and Volunteerism** that promotes the statewide value of service and volunteerism. The Governor of Oregon should adopt this best practice and add the responsibility of strengthening the relationship between the private, government, and nonprofit sectors. Oregon is one of the first states to lead in the development of **encore fellowships** by **Social Venture Partners Portland** between private employers and nonprofit organizations. Federal funds may become available in the future for such efforts through the **Corporation for National and Community Service**.

In Oregon according to the **Nonprofit Association of Oregon**, there are over **14,000 registered charitable nonprofits that spend more than \$35 billion annually and employ over 160,000—12% of all Oregonians!** Clearly this is an important sector that secures money from outside of the state that eventually circulates in our local economy. Given the state's current and future budget challenges an argument could be made that the government will need the nonprofit sector even more going forward and will need all the human capital it can get in responding to our current and future health, human service and educational needs. The State has a vested interest in strengthening its relationship with the nonprofit sector and in promoting volunteerism.

Many older adults want to participate in "**returnment**" not retirement. "Returnment" is the act of giving back or returning in some small way what the world has given you. **The Oregon Community Foundation, Meyer Memorial Trust, the Nonprofit Association of Oregon, Oregon's United Ways, Oregon Mentors and corporate philanthropy along with others** could lead the way in building the capacity of recruiting, orienting, and supporting skilled volunteers to work with nonprofits. **Hands On Greater Portland** is focusing on older volunteers through their boomer initiative. Nonprofit organizations also need help in learning how to utilize this resource effectively as well.

Unless you are engaged in your later years you are just dying longer not living longer. Older adults who stay engaged either in paid or unpaid work live healthier longer and need less public and private services and family support. Promoting engagement is a smart investment for not only the quality of life for the individual and their family but for the community, employers, families and cost of public services as well.

Sustainability:

Finally Oregon among many other states is increasingly targeting the opportunities and necessities of sustainability. In recent polls the environment is the number one common area of interest shared by the older and the younger generations.

Sustainability is fundamentally an intergenerational issue focusing on leaving the planet as good or better for future generations. The International Bruntland Commission defines sustainability as **“meeting the needs of the present generation without compromising the ability of future generations to meet their own needs.”**

Oregon can be as national and international leader in aging using the themes of **intergenerational interdependence and intergenerational equity** as foundations of our sustainability efforts. Older adults are a **“renewable resource” that represents human capital that can be transformed into new resources and “energy” for our communities.**

Just like wind, wave, sun, and thermal are alternative energy resources so too are the growing numbers of older adults currently aging here and moving here.

There are a number of partners in addition to the ones mentioned above that could step up and be a part of this overall campaign including but not limited to **AARP Oregon, SOLV, Oregon Public Broadcasting, the Business Journal, the Oregonian, the faith community, service clubs,** to name just a few.

Oregon: a State for the Ages.

A state of mind and place that truly will be for all ages and last through the ages.

It is an opportunity and vision waiting to be created.

Jay C Bloom
August 10, 2011

Everyone Matters:

A Practical Guide to Building a Community for All Ages

Report of the Multnomah County Task Force on Vital Aging - 2008

Portland, Oregon



MULTNOMAH COUNTY

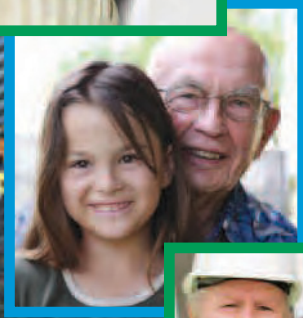




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Complete report including appendices and web links available at www.co.multnomah.or.us/chair



Credit: Travel Portland

INTRODUCTION

It is not all about denying the very real problems associated with aging. It is all about denying the very real potential associated with aging.¹

-DR. GENE COHEN



For decades, demographers have been ticking off a litany of problems that communities around the nation will face as a result of the **Baby Boom generation** reaching retirement age. There is no question that such a large cohort approaching this important milestone **raises challenges** around employment, health care, housing and other areas. But an emphasis on a negative view overlooks **major opportunities** that are emerging as well. There is a positive story that needs to be told and this report represents the first chapter in that story.

Too few communities have developed concrete plans to address the problems associated with the aging of the Baby Boom generation. Even fewer have prepared themselves to **capture the significant potential benefits** that will result from this **unprecedented pool of talent and experience**. Only communities that **plan well** will reap these benefits. Multnomah County has been planning for many years through its Aging and Disability Services Division, Health Department and other agencies to address the potential challenges that may arise. **Multnomah County will also be one of the few jurisdictions in the nation** that will also have a **plan to reap the benefits** of this wellspring by carrying out the recommendations in this report. A more complete copy of this report along with numerous links can be found on the Chair's website at www.co.multnomah.or.us/chair.

At our recommendation, the Multnomah County Board of County Commissioners voted unanimously on February 15, 2007 to create a Task Force on Vital Aging. The Task Force was charged with **identifying opportunities, challenges, best practices and recommendations** for enhancing the **independence, engagement and contributions** of older adults in Multnomah County and throughout our region and to **raise our community's awareness** of older adults as a growing resource who do and can contribute even more to our community.

Vital aging is about having the quality, capacity, and opportunity for continuous engagement at an optimum level through one's life cycle. The Task Force chose to focus on the two primary opportunity areas of **employment and civic engagement** of older adults. We recognize there are many other important avenues to creating a community for a lifetime and a place where people of all ages can thrive and prosper together. These include but are not limited to affordable **housing**, adequate public **transportation**, accessible and affordable **physical and mental health care**, a dynamic **arts community**, **lifelong learning** opportunities, support for **caregivers**, in-home and long-term **care support** and **public safety** to name just a few. Multnomah County, along with our public

sector partners, the support of the private and philanthropic sectors and individual citizens, will **continue to work on this range of issues.**

We would also like to thank Jay Bloom who staffed the Task Force on Vital Aging and who offered overall leadership to the effort. Of course, we also thank each one of the Task Force members and staff who participated and contributed in some way to this excellent final report. They include:

Arleen Barnett, Vice President of Administration, Portland General Electric
Greg Chaille, President, Oregon Community Foundation
Mark Dodson, Chief Executive Officer, NW Natural
Sho Dozono, President, Azumano Travel
Eileen Drake, Vice President of Administration & Legal Affairs, PCC Structural
Nick Fish, Attorney, Meyer and Wyse Law Firm
Gillian Floren, Vice President of Marketing, Greenlight Greater Portland
Joyce Furman, Community Leader
Jerry Hudson, Trustee, Collins Foundation
Pam Knowles, Chief Operating Officer, Portland Business Alliance
Carol Nielsen-Hood, Director, Gresham Chamber of Commerce
Preston Pulliams, President, Portland Community College
Dan Saltzman, Commissioner, Portland City Council
Harold Williams, Board Member, African American Chamber of Commerce
Jay Bloom, Task Force Staff, President, Bloom Anew

We also want to thank the chairs of the workgroups, Joyce DeMonnin, Andy Nelson, Judy Strand and Raquel Aguillon and all of the individuals who contributed to the workgroups. Each is appreciated for his or her contributions. We greatly appreciate support from the underwriters of this report: **AARP Oregon, Portland Business Alliance, Portland Community College and the United Way of Columbia-Willamette.**

Our colleagues on the Board of County Commissioners – Jeff Cogen, Lisa Naito and Lonnie Roberts - have all earned our gratitude for their willingness to support research in this critical, emerging area. We appreciate their continued commitment to the needs of people of all ages in our community.

The primary audiences for this report are **employers, public policy makers and the philanthropic community**, including both **fundors and nonprofit** organizations. We expect each of these groups will find some helpful and stimulating ideas. We believe individual readers will also gain from reading this report since all of us want to age vitally.

Key themes in this report:

- o The **average age** of our local population and workforce is **increasing**.
- o This will lead to significant **challenges for all employers** in the public, private and non-profit sectors.
- o Fortunately, the vast majority of adults **want to work and stay engaged** in our community as they grow older.
- o Area employers and nonprofits will have to **proactively create new approaches and change attitudes** if we are to effectively engage this new significant community resource.
- o **Old models will have to be updated** and retooled and old assumptions and stereotypes “retired.”
- o Harvesting this significant new resource **requires leadership in planning**, identification of **achievable action steps** and **leveraging** the unique contributions of government, business, philanthropic organizations, nonprofit agencies and the larger community.
- o The changes needed in the workplace and civic organizations to engage older adults are **very similar to those desired by the younger generation**. Adapting models to include older workers **will also help attract and retain younger adults** as well.

This process further highlights the role of Multnomah County as a **convener, partner and catalyst** for effective **collaboration** between government, business, philanthropic and nonprofit organizations and other community groups to achieve public purposes.

This report is by no means the “final answer” about how to best capture all the benefits of projected demographic changes in the years to come. It does, however, provide Multnomah County with **concrete strategies** that we would be wise to work to adopt. We hope this report will be a **call for action** for further **innovation and creativity** going forward and provide a **practical guide** to building a community for all ages, one that values the **interdependence** of all our generations. **Imagine a community where “Everyone Matters.”**



Ted Wheeler,
Multnomah County Chair



Maria Rojo de Steffey,
Multnomah County Commissioner
District 1

BACKGROUND

The rapidly graying of America will fundamentally change our culture and present us with some of the most critical policy issues of our times.²

– PAUL HODGE, GENERATIONS POLICY PROGRAM, HARVARD UNIVERSITY

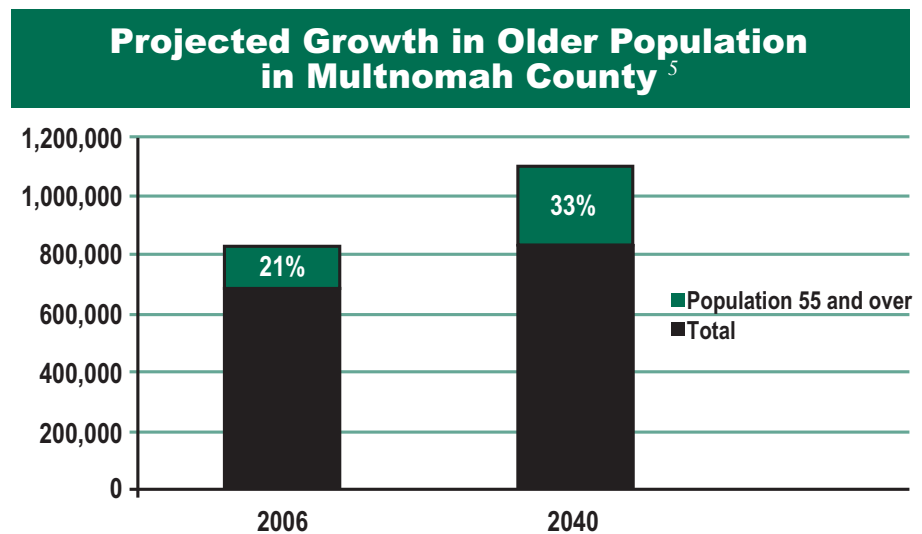
We often hear about the “Baby Boomer” generation. Who are these “Baby Boomers” and why should we care? Born largely between 1946 and 1964, Baby Boomers now range in age from 44-62. They are our aging population and their numbers are far greater than any previous older generation. Adults age 44-62 currently number **78 million**, up from just **43 million** in 1980.³ Oregon’s demographics are consistent with this trend.

This **increase in the number of aging adults** may raise concerns among some, but it also provides us with **extraordinary opportunities**.⁴

This generation of older adults will be the **healthiest**, most **educated**, most **skilled** and most **affluent** in history. Aging adults have the knowledge and skills to contribute to our communities. They have also indicated a fervent desire to continue to actively participate in society through **employment and civic engagement**.⁶

Oregon Gray Matters, a report commissioned by Portland Community College and published by AARP Oregon, found that Oregon shows signs of a state entering the “**longevity revolution**.” These are states in which active aging is predicted to impact the workplace and postsecondary education as older workers return to school for recareering needs. From 2001 to 2005, the number of workers 55 and older increased from 205,097 to 264,930. The labor force participation of workers 55 and older rose from 36% to 45%.⁷

The Portland area is nationally recognized as a bell weather state that anticipates and prepares for societal shifts. This **call to action** is another example of a pioneering effort to harness the capacity and address the needs of our aging population. A recent survey of over 10,000 local governments asked about their preparedness for an aging population. The survey found that only 46 percent of American counties have even begun to address the needs of the rapidly increasing, aging population.⁸ Public policy makers, employers, nonprofit organizations and both public and private funders have the opportunity right now to pursue innovative and effective strategies to engage our aging adults.



Increasingly, reports describe **workforce shortages** of talented and experienced workers and the impact this will have on the public, private and nonprofit sectors. Not only do older adults want to work in future, they want to work in ways that benefit the community and the next generation. They also want more options in how they work. It is to our benefit to identify practices that will provide the desired flexibility while drawing on this vast supply of skill and knowledge.

“Ageism” is discrimination or prejudice against people of a particular age. Ageism is most evident against older adults and can be found in our workplace policies, the media and our culture generally.

Some view older adults as a **growing liability rather than a dynamic asset**. Warnings of Social Security bankruptcy, runaway Medicare costs and excessive demands on long-term care reflect a belief that older adults are a costly burden rather than critical, contributing members of our communities.



70%
of older adults will want to work in some capacity in their later years.

42%
want second careers where they can share or pass on their knowledge to others.

58%
of adults ages 50 to 70 years old would consider taking jobs now or in the future to **benefit their communities**.

78%
of these individuals are interested in working to **help the poor, the elderly, and other people in need.**⁹

There is an increased demand for flexibility and work-life balance not only among older workers but also among younger workers. Creating a flexible and rewarding workplace for older adults will make those businesses and organizations more attractive for employees of all ages.

KEY ASSUMPTIONS

*Poor health is not an inevitable consequence of aging.*¹⁰

- CENTERS FOR DISEASE CONTROL AND PREVENTION

Vital Aging: We intentionally chose the term “vital aging” to reflect that older adults can be creative, productive, successful and healthy. *Aging does not mean disability. Aging is not a disease.* With increased attention to diet, exercise, alcohol intake, smoking, lifelong learning, work and civic engagement our aging population will be the healthiest in history. Even when aging adults have a disability, there are still opportunities for a vital, active life.

Older Adults are a Resource: Older adults represent a growing resource with considerable expertise, experience and available time for work and service to the community. All older adults have value and are capable of meaningful contributions to our community.

Older Adults Pass on Knowledge: Older adults should have opportunities to transmit their skills and knowledge for the benefit of future generations of employees.

New Attitudes, Practices and Policies Are Needed: We must build on the strengths of older adults and give them the opportunity to contribute in a meaningful way.

Active Adults Remain Independent: The more actively engaged older adults are, the more likely they will remain independent and the better their quality of life. They may also be in lesser need of public and private services as they age.

Working Adults Generate Income: Older adults who work longer earn more personal retirement income, pay taxes and continue to contribute to Social Security.

Employment and Civic Engagement Are Critical: We have focused this report on employment and civic engagement as two critical avenues for vital aging.

What’s good for older adults is good for the whole workforce: Young, talented individuals are seeking out workplaces that offer the same kind of flexibility and work-life balance that is needed to maintain and attract older adults.



“Have you given much thought to what kind of job you want after you retire?”

EMPLOYMENT

*We are pushed by pain until we are pulled by vision.*¹¹

– REVEREND MICHAEL BECKWITH

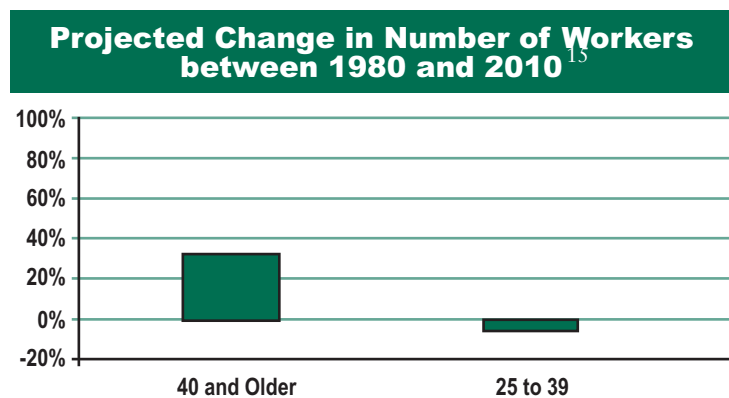
Workforce Shortage and Knowledge Loss

The Bureau of Labor Statistics projects a **shortfall of 10 million workers** in the United States by 2010.¹² Older adults are a critical part of the solution, both because of this shortage and also because of their substantial knowledge.

43 percent of the U.S. labor force will be eligible to retire between 2004 and 2012, impacting the public, private and non-profit sectors. Moreover, for every two workers exiting the workforce **only one may enter.**¹³

Industries in Oregon with some of the oldest workforces are:¹⁴

- * Utilities
- * Education
- * Nonprofits
- * Real Estate
- * Healthcare
- * Government
- * Manufacturing



The impact will be felt in staffing, but also in financial statements and operational issues. Organizations should identify the impact these workforce shortages will have and how older workers can help to mitigate these gaps. Only 36% of Oregon employers say they have taken steps to prepare for an aging workforce.¹⁶

The impending gap is not only in numbers but also in available skills.

*There is business value that is uniquely derived from experience, making it an asset that can't be replaced simply with technical knowledge or know-how.*¹⁷

This includes loss of knowledge, skills, efficiency, loyalty and relationships. The 2007 report “Will Oregon Have Enough Workers,” notes that as Baby Boomers retire, one of the primary challenges will be finding individuals with the right combination of skills and experience to replace them.¹⁸

Relationships that make the work more efficient and more effective are lost. These include networks inside and outside the organization, including relationships with vendors, customers, funders, donors and regulators.

Developing recruitment and retention practices that are friendly to older workers can limit these losses dramatically. The competitive edge and future success of our businesses, nonprofits and public organizations is closely aligned with efforts to recruit, retain, retrain and re-engage older adults.

This chart illustrates the stages of pain an organization may experience as their workforce ages. Organizations will find themselves in different stages of feeling “the pain.”

Where's the Pain? ¹⁹



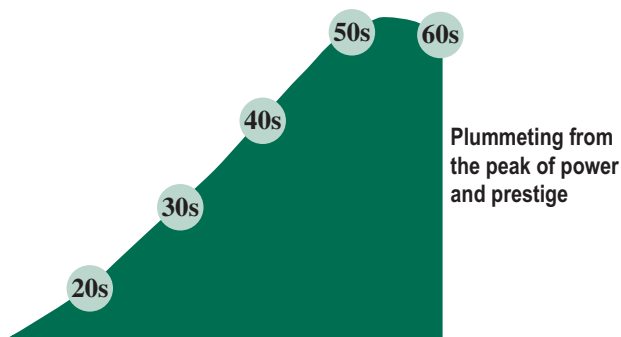
© 2004 Dr. Mary B. Young marybyoung@aol.com

What Older Employees Want

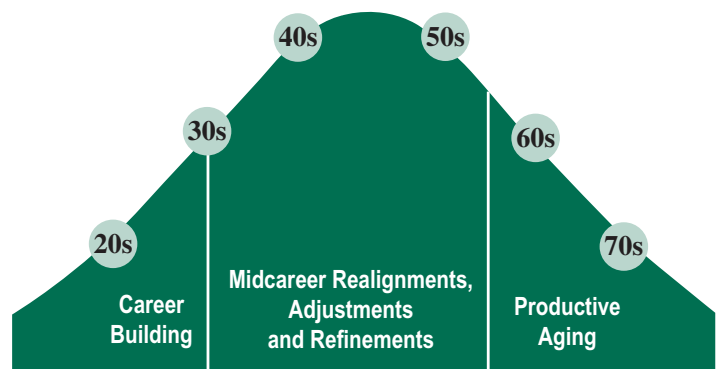
Because the boomer demographic is so large, any generalization will be imperfect. But we do know that **these older adults will age very differently** than previous generations due to their health, educational attainment level, work histories and personal motivation. Studies repeatedly show that the “Baby Boomers” have **no intention of seeking a traditional retirement.**²⁰

The old model of obtaining education, working and then retiring is waning. It is being replaced by **cyclical patterns**, with individuals moving in and out of workforce, educational and leisure activities. For many, retirement will **no longer mean to withdraw**, disappear and wind down to full-time leisure. Rather, it will mean **new beginnings**, continued engagement, productivity and contribution over twenty, thirty or forty years.²¹

Traditional Retirement Profile ²²



Productive Aging View



Source: *Retire Retirement, Rekindle Career, Retain Talent* by Dychtwald, Erickson and Morison. 2005

71% percent of older adults feel that work is part of an ideal retirement.²³

The top reasons for continuing to work (other than for money) are the desire to:²⁴

87%
Stay **mentally active**

85%
Stay **physically active**

77%
Continue to be **productive**

66%
Maintain **health benefits**

Some older adults will have the financial means to choose whether to work. But a **majority of older adults will probably have to work to supplement Social Security support and retirement savings.**²⁵

Workers **age 55 to 59** who say that the **need for income** is a primary reason to work:
72%

Workers **age 60 to 65** who say that their **need for income** is a primary reason to work
60%

Older workers want:

- **Meaningful work** that contributes to the community and to others
- **Flexibility** in work schedules, assignments and location
- **Options** to allow for work/life balance

Most people don't retire because they want to stop working, but because they want more control over their time, for health reasons or for family obligations. Many want to ease into retirement, have more freedom, deal with less stress or simply want a change. Flexibility and options will continue to be key for this generation of workers as it will for younger generations of workers. Offering options will provide a positive return for organizations.

Employers report these **benefits from engaging older workers:**

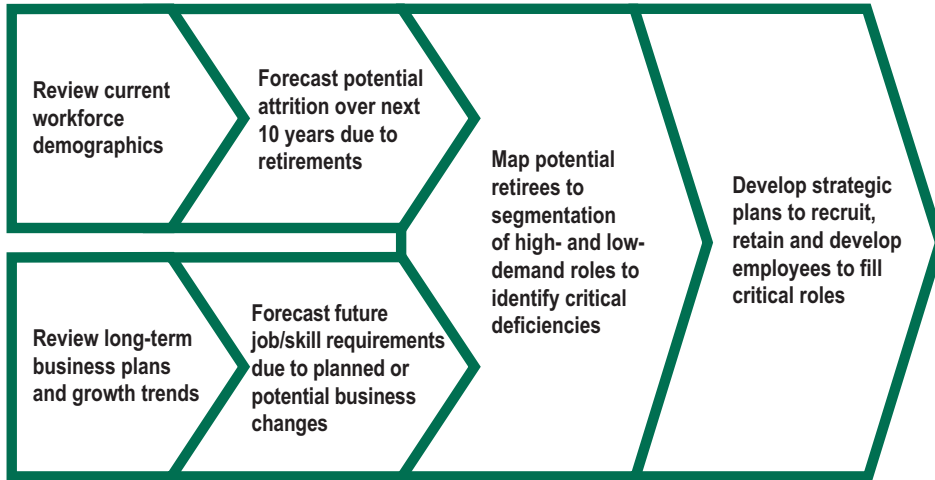
- Reliability
- Problem solving skills
- Informed judgment
- Long-time experience
- Ability to manage crises
- Sense of responsibility and loyalty
- Established networks
- History of working with diverse people

Employer Best Practices

The following best practices allow organizations to approach the aging of their workforce proactively rather than waiting for a crisis. Many organizations and leaders are resistant to addressing new trends and making critical changes even if they will ultimately benefit the organization and its employees. But there are great opportunities to engage older adults and in doing so, ensure greater success for your organization.

Strategic Analysis:²⁶

Figure 1: Forecasting and Planning for Future Retirement-Related Talent Deficits



Best practices:

- Strategic analysis
- Recruitment
- Work environment and design
- Flexible working arrangements
- Compensation and benefits
- Knowledge transfer, mentoring and training
- Multi-generational workforce training

Ask Critical Questions: Does age in your workforce matter given your strategic goals? What percentage of your workforce is approaching retirement? Do you have a future workforce in the pipeline with the requisite skills and experience to meet your goals?

Conduct An Internal Sustainability Workforce Audit: Focus on the age of your workforce, what departments or positions are most vulnerable to knowledge or experience loss, where replacing workers will be difficult, whether key positions have internal candidates ready for succession. Locally, Portland General Electric assesses risk by unit, position and type of risk (retirement, retention, labor market availability and knowledge transfer). They use an annual staffing and development process for each business unit.

Once vulnerable positions, functions or departments have been identified, organizations can take steps to create back-up resources and institute knowledge transfer strategies. This should be part of an overall strategic workforce planning process.

Recruitment

- Partner with organizations that help older workers find jobs.
- Maintain a job bank of retired and former employees who may be interested in filling positions, participating in projects, or promoting openings.
- Supplement recruiting packages with materials designed for older workers.
- Ensure the organization's web site and recruitment materials reflect images of an age-diverse workforce.
- Use positive language and supplement factual information with an emotional message.
- Identify experience as a plus or mature judgment preferred in job ads.
- Use age-diverse interview panels.
- Design interview questions that encourage candidates to share their skills and experience.
- Eliminate barriers by reducing restrictions on post-retirement employment.
- Create an intermediary organization that can help you recruit like "Your Encore.com."
- Create internships for older workers.

Workplace Design

- Ensure that work facilities, equipment and processes are safe and ergonomically sound, and assist employees of all ages. Provide ergonomic adjustments as necessary.
- Ensure that workplace lighting is adequate.
- Ensure that floor surfaces are flat and stairs meet building codes.
- Set computers in a physically appropriate location.
- Design jobs to avoid continued repetitive duties by cross training and rotating employees in repetitive motion jobs.
- Encourage regular stretch breaks.
- Provide training on back care and safety.



Organizational Culture that Supports Manager and Supervisor Readiness

Workers of all ages generally don't leave organizations, they leave their supervisors. Therefore, it is important to invest in training for managers and supervisors so they can provide the experience that will retain and cultivate their workforce.

- **On-going coaching** for supervisors and managers is most effective, helping to **reinforce periodic trainings** and remind managers that accommodating the new workforce is a key element of the organization's **recruitment and retention strategy**.
- Develop an **individual agreement** with each employee to define **expectations** regarding the pace and speed of their **career advancement**, implications for the employee's schedule, compensation and **potential** for promotional opportunities.²⁷

Key Principles:

- Any new work design must work for both the **organization and the employee**.
- Any new work arrangement should be **conditional**, approached explicitly as **temporary**, and **revisited** periodically to ensure success and mutual satisfaction.

Work Design

The old work model of the industrial age was designed for an individual to work full-time, five days a week, fifty-two weeks a year. Newer work design models allow for more creativity, flexibility and choice. Increasingly, organizations are offering work in different designs:

Episodic or durational

assignments allows work to be done for short periods of time or on a project-by-project basis.

Telecommuting allows work to be done outside of the office.

Bridge jobs allow workers to

work seasonally or part-time and may involve changing positions with an organization. Employees may move from a salary to an hourly wage. The goal is to bridge the gap between career employment and complete retirement.

Phased retirement aims to reduce hours and responsibilities for an existing position and potentially, the phasing in of a successor.

Global Trends

In Europe, "**interim management**" is a growing trend. Organizations employ former managers on short-term projects from three to six months.

In Spain, **one in three workers** now appears on the payroll as a **temporary worker**.²⁸

Ask older workers what they want and need. Don't make assumptions.

Flexible Working Arrangements

59% of workers age 50 and older would like to remain in the workforce if they could **reduce their hours** or **have flexible hours**.²⁹ While compensation is important, many workers, especially older ones, report that flexibility is key in their decision to continue to work.

The following are varying types of flexible work arrangements that employers can consider. What they share is that they allow flexibility in:

- Scheduling of work hours
- Number of hours
- Location of work
- Compensation

Individual employees may move in and out of such arrangements over time. A guide to flex-options can be downloaded at www.we-inc.org/flexguide.pdf.

Three Stages in Approaching Flexibility:

- Flexibility is focused simply on its **benefit to the organization**.
- Flexibility **policies are written** particularly to attract and retain employees. Usage is low and often handled on an **ad hoc** basis, risking perceptions of unfairness.
- Flexibility is **the rule** rather than the exception. Organizations not only recognize the increased productivity or service, but also **want their workforce to have as many options as possible** in order to stay healthy and vital.³¹

Compensation and Benefits

To attract and retain workers, employers might consider providing:

- **Compensation and benefit policies**, including retirement pensions, that promote part-time or reduced work schedules and at the very least, do not restrict or create unnecessary barriers to these arrangements.

Employees who have greater flexibility, report higher levels of **job satisfaction**, stronger **commitment** to the job, higher levels of **engagement** and better **health**.³⁰

Flextime: Employees have flexibility in start and end times, maintaining the same number of hours each day.

Compressed work week: Employees work longer hours on some days and shorter hours on other days in that same pay period.

Part-time: Employees work less than full-time.

Job sharing: Two or more employees share one full-time position.

Telecommuting: Employees work from a remote location.

Internships: Employees learn skills as an “apprentice.”

Episodic: Employees work intermittently as needed, on-call or as a back-up or substitute.

Project/Durational: Employees work on time-limited assignments.

- **Health benefits** to a greater portion of workforce, regardless of number of hours worked.
- **Long-term care insurance.**
- **Short and/or long-term disability insurance.**
- **Retirement savings incentives** such as a matching 401K contributions, profit sharing or stock options.
- **Elder care and care giving support.**
- **Tuition, professional development and lifelong learning support.** Older workers often need training to learn new skills and promote themselves.
- **Diverse training** that incorporates multiple learning styles and adult learning principles which may include classroom learning, distance learning, individualized training, coaching, internships or apprenticeships.
- **Travel reimbursement** and public transportation vouchers.
- **Wellness trainings** that include health screenings, nutrition guidance and internal fitness programs or discounts on fitness memberships.
- **Internal volunteer programs.**
- **Retiree associations** providing opportunities for continued engagement and connection.
- **Non-monetary forms of compensation** as described in the nonprofit section of this report.



Retirement and Life Planning

One benefit being offered by some organizations is life planning for pre-retirees and sometimes, their partners. Weyerhaeuser has been providing this service since 1986. Providing life planning and retirement seminars may help explain your organization's retirement and Social Security benefits and introduce employees to the idea of planning for other aspects of their later years. Providing this service for current employees



nearing retirement can serve a variety of purposes:

- **Employee** is better prepared for retirement.
- **Employer** may obtain critical information about an individual's plan for retirement.
- **Employer and employee** can begin to talk about possible options.

Many employees are anxious about retirement and the uncertainties it will bring in role identity and economics. Anxious workers are generally more distracted and less productive. Helping employees plan for this significant life transition can lessen their anxiety and help them **make better decisions** about how and when to retire or re-career.

It is in the organization's best interest to have more satisfied and prepared retirees whether as ongoing ambassadors for their organization or as a future workforce resource.

Knowledge Transfer/Mentoring/Training

Workers age 50 and over are more likely to have **remained with one organization** or in the **same field longer** than the younger generation.³² Employees who are able to work at organizations for long periods of time are more likely than short-term employees to **accumulate job-specific critical knowledge** around business operations, organizational culture, best practices and technological changes and adaptations. This is what we consider "**institutional memory**."³³

Organizations can mine this critical knowledge and experience through formal mentoring and training programs. Mentoring can occur on an informal basis, but more successful mentoring efforts are more formal. Here are some tips for designing an effective mentoring program in your organization:

- **Screen effectively** for those individuals have the skills and temperament to be a mentor. Not everyone does.
- Mentors need upfront **training and ongoing coaching**.
- Before meeting a mentor for the first time, **employees should analyze their own objectives and learning styles**. The best mentoring programs have identified specific skills and knowledge to be transferred.

Life by Design Northwest (lifebydesignnw.org) provides life planning in the greater Portland metropolitan area and is available for employers, their employees and the public at large. The initiative was launched by:

- AARP Oregon
- Express Personnel
- Hands On Greater Portland
- Morrison Child and Family Services
- Multnomah County Library
- Northwest Natural
- Oregon Public Broadcasting
- Portland Community College
- Portland State University

- Arrange meeting times, locations and frequency to **accommodate both parties and cultivate a personal connection.**
- Recognize opportunities for “intergenerational” mentoring or “**mutual**” mentoring so that both parties can learn from each other.
- Assure older employees that they are **not working their way out of a job** by teaching skills to younger employees.

An added benefit of a formal mentoring program that matches older with younger workers is that it can reduce biases and myths that both parties may have. Interaction between workers of different ages can ease awkwardness, tensions and help everyone realize that all generations have something to offer the workplace and to each other.



Multi-generational Workforce Training

Organizations that want to respect and cultivate diversity among their employees are increasingly adding age as another key element of a diverse workforce. Such efforts can **reduce stereotypes and improve inter-generational communication** in the workplace.

Only 16% of organizations have prioritized demographic issues in their training.³⁴ In recent years the term “cultural competence” has emerged, which suggests a knowledge of multiple cultures, styles and needs in order to be successful with diverse staff, customers and organizational partners. “**Generational competence**” would begin to encourage organizations and their employees to understand, appreciate and meet the specific needs of different generations.

One-fifth of employed adults today are older than their bosses. This percentage is expected to grow dramatically in the years ahead.³⁵

What is it like to be supervised by someone the age of your son, daughter, niece or nephew? What is it like to supervise someone the age of your parent? Organizations need to initiate discussions about generational differences and perspectives and form teams that deliberately include members of varying generations. Multi-generational management is in its early stages and our capacity and capabilities in this area will surely grow in the future.

It's like the 1970s, when women were streaming into the workplace. Employers who paid attention and changed their policies to be friendly to women had a powerful edge. The same thing is going to happen as boomers age. There are great opportunities for employers who can make their policies diverse enough to accommodate everyone.³⁶

-DEBORAH RUSSELL, DIRECTOR OF ECONOMIC RESEARCH, AARP

CIVIC ENGAGEMENT

Community service or volunteering through nonprofit and charitable organizations is a very common pursuit in the United States and contributes significantly to our overall quality of life here in Multnomah County and throughout our state.

Volunteering happens most often informally, without involving any organizations. All cultures and ethnic groups value helping their neighbors. One can argue that care-giving of any type is a form of civic engagement. We need to acknowledge the work that older adults do for others as valuable. Women, in particular, deserve respect for their daily care-giving.



Caregivers contribute billions of dollars to society in the form of unpaid work.³⁷ We need to recognize and reward these efforts. We must also acknowledge other forms of civic engagement, including serving in a public office, serving on public commissions and advisory boards, voting and other forms of public advocacy. There are other intermediary groups, such as faith communities, fellowships, service clubs and various neighborhood organizations that contribute to the community's well-being and can leverage the aging individual's desire for community involvement and meaningful work.

For purposes of this report, we have chosen to focus on civic engagement through nonprofit organizations.

The Unique Case for the Nonprofit Sector

The nonprofit sector has many reasons to care about our aging population, particularly given its size, educational and skill level, good health and relative wealth. The boomers will have the money, expertise, desire and time to engage in community work through nonprofit organizations. The Portland metro region ranked number six in the country for volunteer rates of civic engagement.³⁸

The aging of boomers will affect the nonprofit sector workforce as well as its donor base, volunteer corps, advocacy capacity and direct service demand.

Adults age 45 and older account for 77% of financial assets in the United States, control 70% of total wealth and account for more than half of the nation's discretionary spending.³⁹

There is a potential labor market that could meet people's desire for a sense of purpose and a hope of making a contribution to something larger than themselves. I see a potential movement, an intersection of the practical assets of work with the higher purpose assets of service.⁴⁰

-MARC FREEDMAN ENCORE- FINDING WORK THAT MATTERS IN THE SECOND HALF OF LIFE

As with other sectors, the nonprofit sector has begun to experience a **shortage** of line workers, middle management and upper managers. This shortage will only grow in coming years.⁴¹

Two-thirds to three-quarters of the executive directors of nonprofits plan to leave their jobs in the next five years.⁴² Between **2007 and 2016**, nonprofit organizations **will need to attract** a total of **640,000 new senior managers**, 2.4 times the number currently employed. This is the equivalent of recruiting more than **50 percent** of every MBA graduating class, at every university across the country, **every year for the next ten years.**⁴³

However, **attracting and retaining a workforce based on financial compensation in the nonprofit sector is almost an oxymoron.** The cost of living in most of our communities for housing, transportation, health care and child care, has significantly outpaced social sector financial compensation. There are exceptions, but as a rule, the vast majority of nonprofit organizations have not kept up with yearly inflation increases during the past twenty years, and this is not likely to change in the near future.

Close to **nine in ten nonprofit** organizations that recruited employees for professional and administrative jobs during the past year found the task to be **“somewhat” or “extremely” challenging.**⁴⁴ Fewer **college students** are majoring in the social sciences as opposed to business, law and computer science. College students are carrying ever increasing educational debt, a significant financial barrier to working in the nonprofit sector.⁴⁵

Nonprofits can expect even more fierce competition from the private and governmental sectors for a decreasing number of available young workers in the years ahead. Along with other employers, nonprofits are **increasingly putting the burden for health insurance costs and retirement savings** onto the employee, exacerbating the problem of limited compensation.

But if nonprofits choose to compete for the older workforce, they have some **critical challenges.** The **best practices** identified earlier in this report for employers are applicable to nonprofit employers as well.



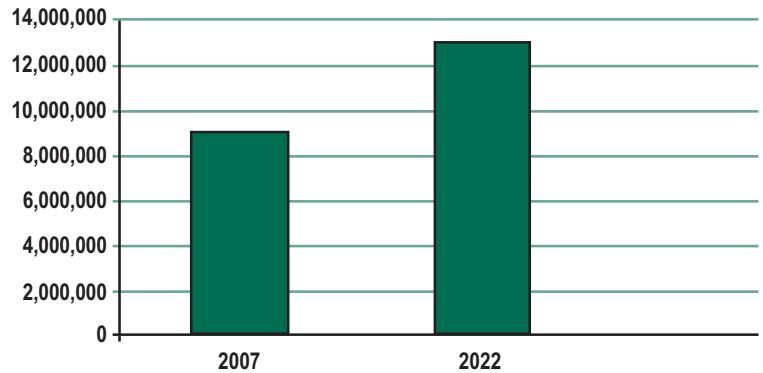
One-third of boomers volunteer and have the highest volunteer rate of any group.⁴⁶

There are other opportunities in nonprofits besides a typical paid position. One nonprofit, ReServe, recruits and places older adults in other nonprofits and pays a stipend equivalent to \$10 an hour for up to 15 hours a week. The positions include senior management and middle management as well as line positions.

Nonprofits need to broaden their view of older workers, whether paid or unpaid, to see them as **significant assets**, a kind of donor to their organization and mission. There is the potential value for **millions of dollars worth of work in unpaid hours and work at discounted pay rates**.

Conceptually and practically it is important for nonprofits to develop a continuum of work and compensation options.

Projected Growth in Number of Volunteers Age 65 and Older in U.S.⁴⁷



THE NEXT CHAPTER: REAPING THE EXPERIENCE DIVIDEND⁴⁸

THE SPECTRUM OF SERVICE AND WORK OPTIONS

	OCCASIONAL, UNPAID COMMUNITY VOLUNTEERING			ONGOING, PAID COMMUNITY SERVICE WORK		
Options	Episodic, informal volunteering	Episodic formal volunteering	Ongoing formal volunteering	Sustained intensive service	Part-time public service employment	Fulltime public service employment
Commitment & Compensation	Occasional Low level commitment No organized volunteer structure	Intermittent One-time commitment Organized volunteer structure	Regular 2-5 hrs/week over 6-12 months/year Possible expense reimbursement	Ongoing 10-15 hrs/week 9-12 months/yr Stipend Transportation or meal expenses Insurance	Part-time 16-32 hrs/week Wages or salary Possible employee benefits	Full-time 40 hrs/week Salary or wages Health benefits Other employee benefits
Examples	Helping neighbors Friendly visiting	Special events Short-term projects	Mentor Tutor Coach Hospital aid Museum docent	Stipended service programs in: •Education •Caregiving •Youth services	Nonprofit or public agency worker Childcare worker	Teacher Nurse Nonprofit manager Social entrepreneur

What Older Adults Want from Civic Engagement

Older adults have a variety of reasons for civic engagement, from **using their skills and experience** and continuing to **feel productive**, to **maintaining social interaction** and leaving a **positive legacy**.

Returnment – the act of giving or returning in some small way what the world has given you, especially as an alternative to retirement.⁴⁹

- JAY C. BLOOM

There are a number of challenges, however, for nonprofits to effectively engage older adults. Older adults often **prefer to use their professional skills** and experience rather than do general labor. But most nonprofits do not have the capacity to utilize the experience and skills of the large numbers of adults who will potentially want to engage in this sector.

As in paid work, older adults are **looking for flexibility in their civic engagement** as well. Short-term, episodic work for example, may be attractive to many older adults. **Options** that include **minimum wage, stipends or working for health insurance benefits** may also be inviting to older adults.

The challenge for the nonprofit sector is to move away from preconceived notions about what a job should look like, to craft jobs that fit both the goals and needs of the people occupying them and those of the employing organization.⁵⁰

-DR. PHYLLIS MOEN

For those older adults who do not need financial compensation, there are a number of forms of compensation, incentives and benefits that nonprofits can promote and actively utilize. These can include the opportunities to:

- Employ their **skills, expertise, wisdom**
- Learn **new skills** for personal interest or future paid employment
- Meet **new and diverse people** and gain exposure to new cultures
- Work on a **team**
- Give back to the community, **make a difference**, leave a legacy
- Receive **recognition** and appreciation



- Feel needed and have a **purpose**
- Work in **different kinds of roles** ranging from board member, senior or middle management, program staff
- Have **new experiences**
- Maintain a **flexible schedule** with episodic work
- Obtain **mentoring or training**
- Receive **recognition** in an annual report, newsletter, certificate or event
- Receive a **reference** for potential future paid employment
- Work in an environment where **employee opinions matter**
- Receive a discount for a service, product or admission to an organization
- Increase **mental and physical health** by staying engaged
- Maintain a **structure** to daily life
- Expand **network** through meeting other staff, board members or individuals who work with the organization
- **Connect previous career** with the next life stage
- **Create balance** between leisure and work
- Volunteer or **work alongside a spouse, partner or family member**

Nonprofits will benefit by keeping these motivations in mind as they design promotion, recruiting and retention efforts.⁵¹



CHALLENGES/BARRIERS

Every day, people have problems for which they do, in fact, have the necessary know-how and procedures. We call these technical problems. But there is a whole host of problems that are not amenable to authoritative expertise or standard operating procedures. They cannot be solved by someone who provides answers from on high. We call these adaptive challenges because they require experiments, new discoveries, and adjustments from numerous places in the organization or community.⁵²

-RON HEIFETZ, MARTIN LINSKY, LEADERSHIP ON THE LINE

In addition to employing best practices, there are adaptive and **attitudinal changes** that need to occur. These changes may actually be more difficult to address. To date, most aging policy, literature and services are largely **focused on aging as a period of declining function and withdrawal from social engagement**. This is changing, but very slowly. **Stereotypes are common**, ranging from a belief that older workers are ill more often, to the idea that older workers are less flexible and adaptable than younger workers. **Age discrimination is alive and real.**⁵³

Other **attitudinal barriers** include the belief that:

- There are **enough younger people** available to work full-time.
- We have to treat everyone the same and that **customizing agreements** with individual employees is inherently **unfair and unjust**.
- Such adaptations are **too time-consuming**.

The workplace is becoming filled with more generational, economic and lifestyle diversity. Consequently, different attitudes and approaches need to be developed.

HOW BUSINESSES PERCEIVE OLDER WORKERS ⁵⁴

AARP asked 1,000 executives whether they agreed with some commonly perceived advantages and disadvantages of older workers:

Advantages	Percentage who agreed
Experienced	91%
Knowledgeable	78%
Ability to mentor other workers	71%
Valuable insights into customer or business needs	63%
High level of engagement in their work	37%
High productivity	23%

Disadvantages	Percentage who agreed
Uncomfortable with technology	52%
Inflexible	49%
Difficulty reporting to younger supervisors	44%
Risk of health problems	30%
Lower productivity	18%
Unwilling to be a team player	14%

SOURCE: AARP

BETSY BOCK/Staff Artist

Participating in diversity training may be an important technical tool, but deeper learning, coaching and real-life experience is needed for adaptive learning to occur and for an individual to become more culturally and generationally competent.

Leadership for technical and attitudinal changes must start from senior leadership and be actively pursued by all levels of the organization, recognizing there will be resistance.

*Effective leadership is the capacity to disturb people at a rate they can absorb.*⁵⁵

-LEADERSHIP ON THE LINE

Human Resources Focus Must Change: Human resources department must become more focused on strategic workforce development rather than being primarily risk management agents.

Costs Can Be Recovered Over Time: Managing two part-time people rather than one can be more expensive and challenging. However, it is not unlike the initial investment in technology. If done right, the frustrations and upfront costs can be recovered many times over with greater productivity, retention, and job satisfaction.

Some **common assumptions** nonprofits must challenge:

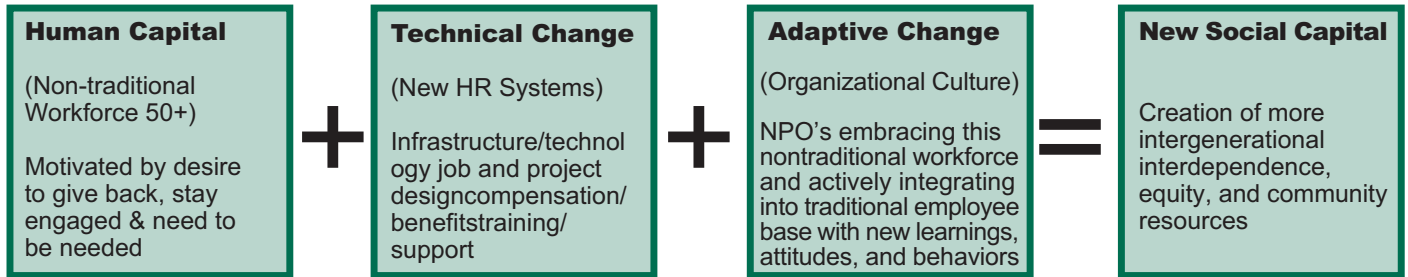
Older People Want To Work For Market Wages or Just Volunteer: This may be true for some, but many older adults may be willing to work for a lower wage, for a stipend or for some other monetary or non-monetary benefit.

People Want To Work Only In Their Area Of Expertise. While that may be true in some cases, other individuals may also want to try or learn something new.

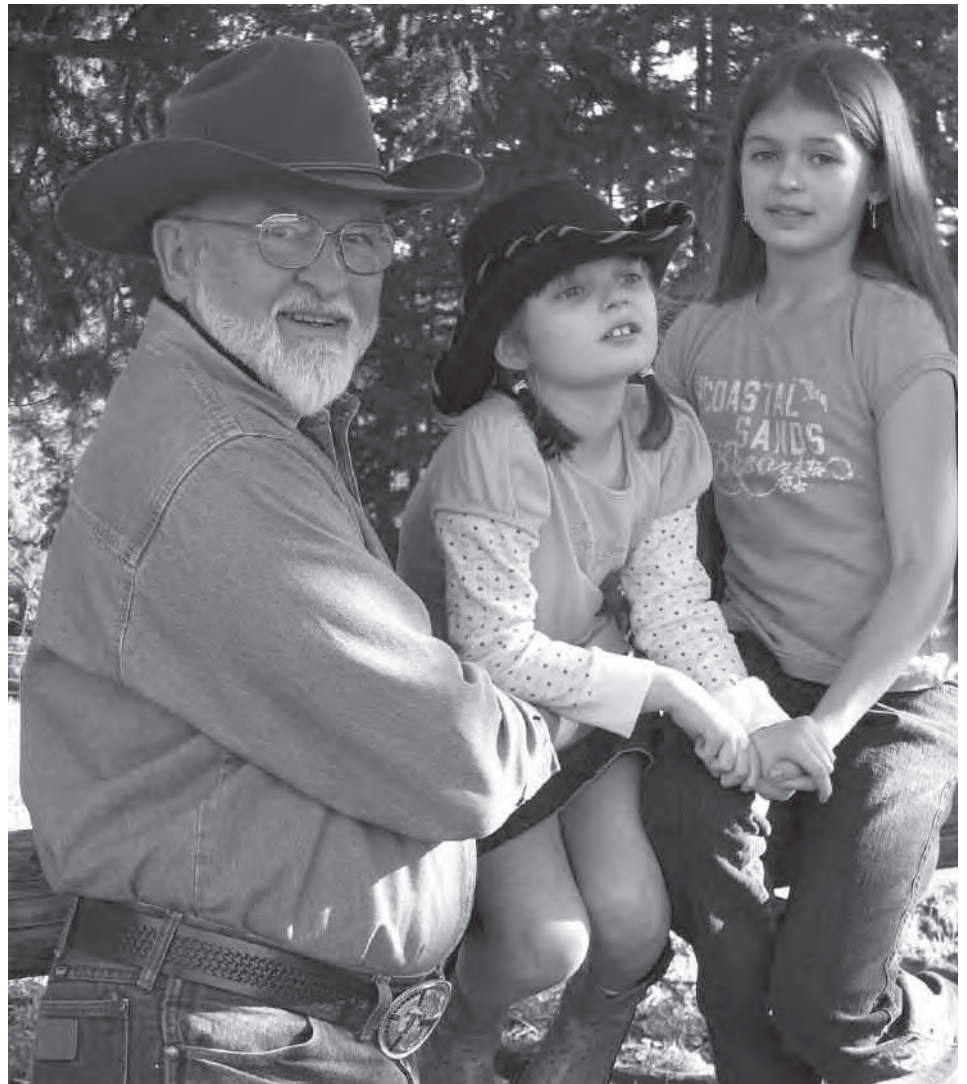
The Costs Are Too Great. Organizations must make investments in infrastructure to effectively recruit, screen, orient, train, support and evaluate the current and new workforce. Managing this new workforce is not unlike investing in fund development; cultivating and securing donors takes planning and resources. Most professional fundraisers acknowledge that it takes money to raise money. Harvesting this growing workforce resource will also take an investment of time and resources.⁵⁶

Given that the vast majority of nonprofits are relatively small, they may need third-party institutions to support these functions and lessen the overall burden for the individual nonprofit organization. All of us should revisit our assumptions on aging and recognize the significant challenges our organizations face.

“Experience making a difference”⁵⁷



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RECOMMENDATIONS

These recommendations for next steps are provided for:

- Employers
- Nonprofit organizations
- Public and private funders
- The community at large
- Multnomah County government
- Public policy makers

Employers: Private, Public and Nonprofit

- Beginning with executive leadership, **publicly and intentionally commit your organization** to full utilization of workers age 50 and older. Reward employees who embrace this commitment and do not tolerate indifference or lack of support.
- Conduct a **workforce sustainability audit** in light of your organization’s strategic direction.
- Create **flexible options** for as many workers as legally possible. Toss out that ‘one size fits all’ in benefits and work arrangements.
- Establish and **cultivate a culture and work environment** that values cross-generational diversity. Combat negative stereotypes of all age groups.
- Proactively **develop knowledge transfer strategies**.
- Conduct **multi-generational training** as part of overall diversity training.
- Support **retraining and development programs** for all workers, giving action to the term “lifelong learning.”
- Offer **life planning** for pre-retirees through workshops and/or one-on-one coaching.
- Allow **flex-time** for employees to be able to engage in community projects prior to their retirement.
- The Portland Human Resource Management Association and others could maintain an **ongoing learning community** specifically focusing on best practices for employing older adults.



Nonprofit Organizations

- **Expand language.** Recognize that the lines will blur between volunteers who are unpaid and those who receive a stipend or other forms of compensation. Some volunteers will prefer to have a specific title, such as member, staff, associate, participant, mentor, teacher, advisor, coach, consultant, project manager, coordinator, or by specific function such as designer, clerk or discussion leader. Where appropriate, use functional descriptors for these positions.
- **Pay the upfront costs.** Engaging unpaid individuals does cost time, money and requires effectively investing in infrastructure and systems to manage this resource well.
- **Assign management of unpaid staff to professional volunteer managers** with attention to job and project descriptions, orientation, training, supervision and evaluation. Where appropriate, ensure that the volunteer management function is fully supported by human resources, rather than fund development offices.
- **Strengthening the volunteer management function** through staff participation in Northern Oregon Volunteer Administrators Association (NOVAA), training and other professional development opportunities.
- **Organize and sponsor regular nonprofit work fairs.** Potential sponsors: Life by Design, Elders in Action, Idealist.org, Nonprofit Association of Oregon, Hands on Greater Portland.
- **Don't assume that money is the number one motivation** for older workers wanting to work in the nonprofit sector. There are many other compelling reasons individuals choose to do this work.
- **Create work and compensation options.**
- **Create unpaid staff career ladders** or tracks that allow for advancement.
- Hands on Greater Portland, the Northwest Oregon Volunteer Administrators Association, Metropolitan Family Services, TACS and the Nonprofit Association of Oregon (NAO) should **continue to develop and promote best practices** for engaging older adults on their websites as well as through training, workshops and consultation.



Philanthropic and Public Funders

- Provide **funding for nonprofits** that demonstrate successful models of engaging older adults.
- Provide more **funding for training and placement programs** that target older adults through One Stop Career Centers like WorkSystems.
- Invest in funding the infrastructure of an existing organization like Technical Assistance for Community Services (TACS) or a new organization that can serve as a **broker between older adults who want to work in the nonprofit sector and nonprofit organizations**. Think of a temporary agency model targeting nonprofits that can cover a full range of compensation including paid, partially paid and unpaid work.
- Invest in funding in nonprofit organizations for **succession planning and executive transitions**.
- Provide funding for **executive coaching and professional development**. Fund support for structured peer networking opportunities for executives.
- Annually **recognize the top ten best nonprofit organizations** that engage older adults with compensatory prizes.
- Provide **seed money for colleges and nonprofits** to develop educational programs designed to tap the time, talents and skills of older people.
- Provide **general operating and unrestricted support**, more multi-year support and capacity-building support for nonprofits.

Community at Large

- Create an **online resource and information packet** available for employers of all sizes with information and tips on how to make a workplace friendly for all ages. Potential sponsors: Portland Business Alliance, Oregon Business Council, Oregon Business Association.
- Organizations such as Life by Design Northwest, Hands On Greater Portland and Idealist.org develop and maintain comprehensive content on their **websites for older adults with links and resources** for discovering, designing and engaging in their later years.



- Make current local **employment placement and training programs** work more effectively for older people.
- **Transform neighborhood schools into community centers** for all ages and activities, considering using school buses as transportation options. See complete report on the web which details the case for schools.
- Provide and strengthen **opportunities for social interaction** among isolated and vulnerable, older adults. This alleviates or reduces isolation, loneliness and depression. Faith communities, community associations and individuals can be very important resources in this area.

Multnomah County

- Be a model **governmental employer** of older adults in recruitment, retention, management, training and the development of policies and procedures.
- Identify **one contact** as a resource for citizens who may want to directly volunteer for the County and for any County manager who may have a project or job for a volunteer.
- Develop and/or strengthen **existing intergenerational approaches** of human service programs that the County directly provides or funds throughout its departments.
- Expand programming and **outreach by Multnomah County library** to older adults. For example, use one of “Everyone Reads” campaigns on a book about different generations and their interdependence with each other.
- Offer **award points in County Requests for Proposals (RFPs)** in the external contracting process for organizations that create effective engagement opportunities for older adults.
- Create an ongoing **vital aging awareness campaign** that displays positive examples of older adults as employees, engaged and giving in our community. Possible sponsors: The Oregonian, Portland Business Journal, local hospitals, health insurers and television stations.



- **Share County practices** and learning with other private and public employers.
- Create a **community engagement plan** that utilizes members of the Task Force on Vital Aging and workgroups to reach out and share results of this final report with community groups and other organizations.
- Partner with the City of Portland’s planning department in strengthening Portland and Multnomah County as a community for all ages by **building on the “Age-Friendly Cities” report** published by the World Health Organization.
- **Leverage resources** with other public and philanthropic funders in intergenerational programs, such as the SUN Schools Initiative and the Oregon Community Foundation and others.
- Maintain up-to-date vital aging **resources on the County’s website**.
- Work with Greenlight Greater Portland, City of Portland, Oregon Business Council, Portland Business Alliance, State of Oregon and other appropriate groups in promoting the **recruitment and retention of older adults as an economic development strategy**.
- Pursue opportunities for **national philanthropic funding and investment** in Multnomah County as a model community for vital aging.

Public Policy Considerations

- Provide **tax credits for employers** who hire low-income older adults.
- Reduce minimum number of hours required in order to be **eligible for health insurance**.
- Advocate for **change in IRS laws** to allow individuals to work and draw on earned pensions in the same company after age 55.
- **Change defined benefit retirement** plan pay-outs from ‘last three years’ to ‘best three years.’
- Advocate making **health insurance portable** and not tied to any one employer.
- Create **greater flexibility** in wage and hour laws for nonprofits to utilize stipends and other forms of compensation.



-
- Provide **tax credits to individuals volunteering** in nonprofit organizations or schools.
 - **Open state employees' health insurance pool** for nonprofit organizations to use the umbrella of a larger group to purchase health insurance for their employees.
 - Significantly **expand national community service programs** such as Experience Corps, AmeriCorps, RSVP, Foster Grandparents, Senior Companions and Peace Corps.



CONCLUSION

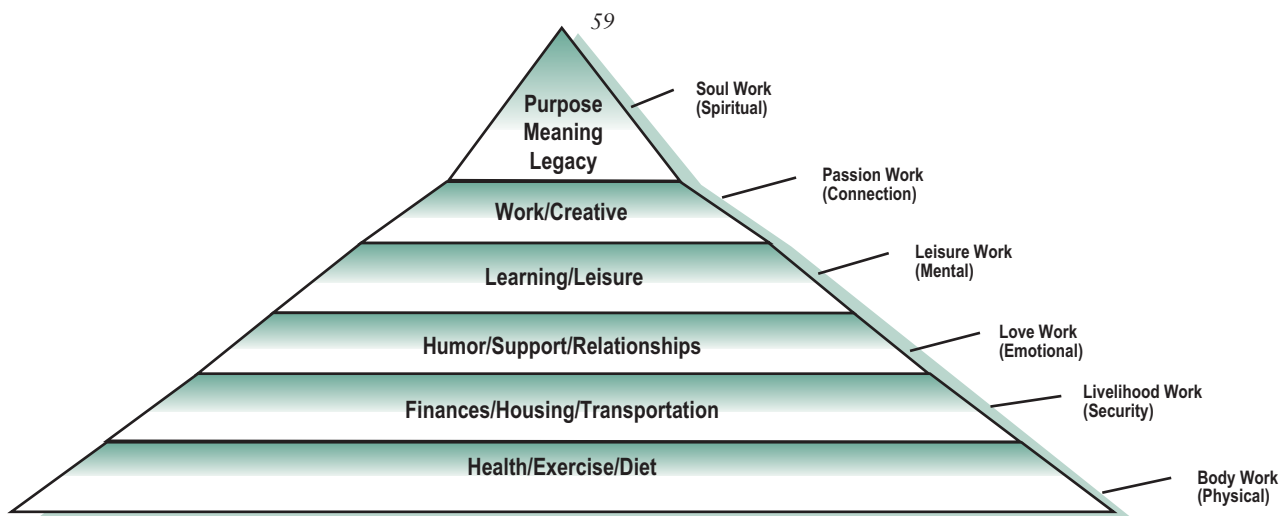
*Getting older is a fascinating thing. The older you get, the older you want to get.*⁵⁸

- KEITH RICHARDS

- Older adults represent a growing resource for employers and nonprofits
- One size does not fit all. Individual choice and flexibility will be the driving forces.
- Changes are needed in organizational technical practices and in the adaptive attitudes of managers and employees.
- Best practices for employing and engaging older adults make organizations more attractive to workers of all generations.
- Older adults represent a significant economic development opportunity. See the online complete report for more details.
- An age friendly community for older adults is an aging friendly community for all ages.

While the work of the Task Force is complete, the magnitude of these issues indicates the need for further discussion, planning and action. No organization will be untouched by the dramatic demographic change that is taking place.

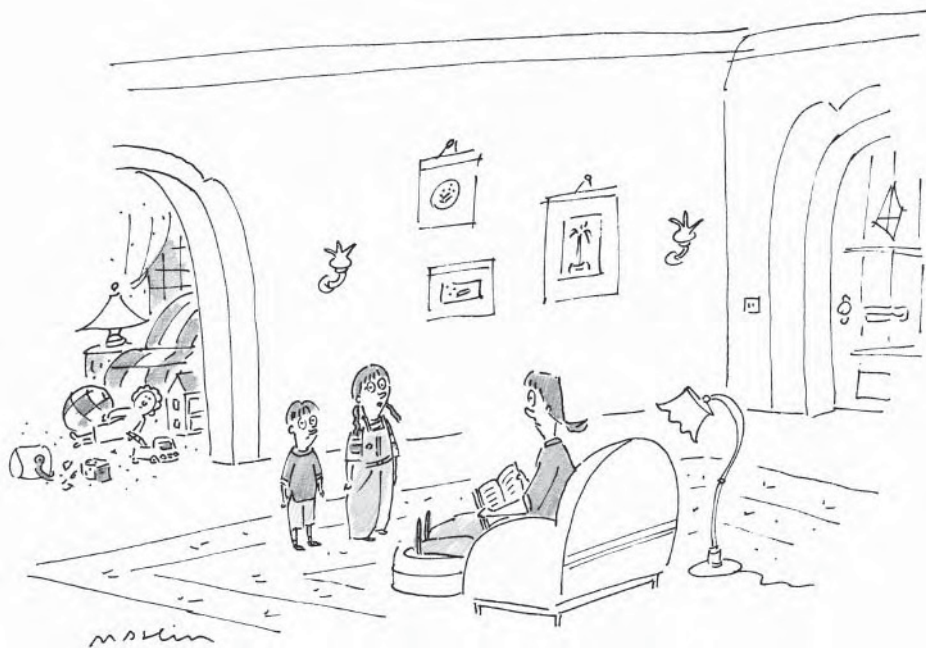
Each of us hopes to have the option of facing the question, “What can I do to create a purposeful and vital life in my later years?” This pyramid illustrates the hierarchy of needs of older adults which range from satisfying basic needs to attaining purpose and meaning.



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It is very hard to say no to work. We may courageously resign, take a sabbatical, or retire to a simpler, more rustic existence, but then we are engaged in inner work, or working on ourselves, or just chopping wood. Work means application, explication, and expectation. There is almost no life human beings can construct for themselves where they are not wrestling with something difficult, something that takes a modicum of work. The only possibility seems to be the ability of human beings to choose good work. At its simplest, good work is work that makes sense, and that grants sense and meaning to the one who is doing it and to those affected by it.⁶⁰

-DAVID WHYTE



"We're tired of playing. We want to work."

If our older generation wants to engage in our community, we cannot afford to pass on this gift. We challenge organizations and individuals to imagine the possibilities.

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Credit: Travel Portland

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From: Tom GUSTAFSON [mailto:TomandAliceG@MSN.com]
Sent: Monday, October 31, 2011 4:51 PM
To: Planning and Sustainability Commission
Subject: The Portland Plan

In the 90's East Portland, when we were annexed to the city, were told we would have all the amenities of the city, one of which would be sidewalks, at least on the arterial streets.

Three streets, NE Glisan, NE Halsey from 132nd street to 148th street, have yet to have sidewalks on either side of the streets and around Glendoveer Golf Course. Only a few individual owners chose to put these walks in front of their homes, but the majority have not.

With light rail coming in, people have had to walk in the bike lanes or when bikes are there, have had to walk the streets. Many people use buses on these streets and have to walk a narrow path, filled with dirt or weeds to get to their bus stop. We are told we should walk more, and would, if there were proper sidewalks to walk on. You can imagine when a mother strolling with her children has to take to the street or a person in a wheelchair does the same. I have seen this happen numerous times over the years.

I believe it is time for the city to recognize we are part of Portland, not just for the taxes we pay, but for giving us the same quality of living as the inner city. There are many streets this side of 162nd (that is part of Portland) that do not even have paved streets in their neighborhood. Sidewalks should, at the least, be a priority for East Portland.

Alice Gustafson
1210 NE 152nd Av
Portland, Or. 97230

Member of Wilkes Community Group