

# LAKE OSWEGO ADULT COMMUNITY CENTER



## A PROJECT TO DEVELOP CURRENT VISION, MISSION and VALUES STATEMENTS



February 26, 2015

Final Report

Prepared by Forward Motion in association with Ideascap, Inc.

## FINAL DELIVERABLES

---

This report is the final documentation of the process facilitated by Forward Motion and IdeascapE to assist the Lake Oswego Adult Community Center (LOACC) to research and revise its organization mission, vision and values statements. The process involved the following internal and external methods: staff meetings and visioning sessions, public meetings, a public survey, and ongoing communications/strategizing with organization leadership. Significant efforts were made to engage LOACC volunteers, members and a cross-section of Lake Oswego citizens in this process. For example, to be as inclusive as possible for maximum participation in the process, notices were published in *Hello LO*, invitations and a survey notice were publicized via email blasts, and staff members conducted personal outreach to LOACC members, guests and volunteers.

Although the mission, vision and values statements are the “final products” for this project, the LOACC staff is aware that these statements not only provide a compass for the organization’s work but also should serve the foundation for development of a detailed strategic plan. That plan will outline the elements of how the organization will live up to its mission, vision and values through its programs, adaptability to changing demographics and community needs, staffing, strategic partnerships, and facilities.

In addition to the deliverables stated below, we have included complete documentation of the project. This includes everything from meeting notes to key communications to survey data. This content is organized in reverse chronological order.

### Mission

The Center provides citizens ways to enrich their lives.

### Vision

Generations of citizens in our community come to the LOACC to have welcoming and transformational experiences. We enrich and excite adults with programs and classes that meet their needs and staff who create positive experiences for all.

### Values

Stewardship (**Caring for People and Environment**)

Inspiring Connectivity (**Building Community**)

Creative engagement (**Enriching Lives**)

Based on:

- Integrity
- Honesty
- Caring
- Compassion
- Accountability
- Adventure
- Cleanliness
- Safety

### **CONTRACT PERFORMANCE REQUIREMENTS**

**Scope of Work:** The City seeks a contractor for a visioning process for the ACC. The selected contractor will write a plan to engage the community in the development of a vision statement for the organization, along with mission and values statements. The contractor will work with Adult Community Center staff, volunteers, Parks and Recreation Department staff, community member, Center member and volunteers in a series of engagement activities, the result of which will be a successful collaboration to produce these documents.

**Deliverables:** Community Engagement Plan; Vision Statement; Mission Statement, and Values Statement.

**Contractor's Anticipated Duties:** The contractor will work with Adult Community Center staff, volunteers, Parks and Recreation Department staff, community members, ACC members and volunteers in a series of engagement activities, the result of which will be a successful collaboration to produce the deliverables. The expectation will be for the contractor to meet agreed-upon deadlines and communicate process at designated benchmarks.

## DOCUMENTATION (IN REVERSE CHRONOLOGICAL ORDER)

---

### FINAL PUBLIC-STAFF PARTICIPANT MEETING NOTES – FEB. 21, 2015

#### Focus of session:

Mission: The Center provides citizens ways to enrich their lives.

Vision: Generations of citizens in our community come to the LOACC to have welcoming and transformational experiences. We enrich and excite members of all ages with programs and classes that meet community needs and staff who create positive experiences for all.

Focus questions: What do you want to see in place at LOACC in 5 to 10 years as a result of your actions?

#### Staff suggested changes to Vision statement (final staff meeting 2/21/15):

Generations of citizens in our community come to the LOACC to have welcoming and transformational experiences. We enrich and excite **adults** with programs and classes that meet **their** needs and staff who create positive experiences for all.

#### Initial general discussion about the mission and vision statements (focus on positive aspects only):

- “Like the positive words in the statements.”
- “Could change the second use of ‘community’ to residents.”
- “Like ‘enriching,’ ‘welcome’ and ‘multi-generational’ aspect.”
- Ann – we plan to post these in the entrance to the building.
- “Like ‘transformational’ as it refers to quality of life.
- “Like ‘of all ages’ because it assumes change will happen.”
- “Could use ‘adults’ instead of ‘members’ to be more accurate. The Center already is inclusive by default as adults occasionally bring children in their care.”
- “We can welcome ‘all’ but tailor programs to certain age groups.”
- “Adults of all ages.”
- “Like ‘citizens’ in it.”
- “I suggest cutting ‘members’ since that’s not accurate now.”
- “Maybe the focus is good because we’re intending to be more program driven than age driven.”

#### Idea board content:

*Note: **Green** text indicate high-level category and **orange** indicates original priority ideas*

#### Holistic wellness

##### Health focus and fitness

Expanded health and wellness – groups, programs, structure

#### Intergenerational programming

- Off-site intergenerational interactions
- Intergenerational programming
- Family game days on Sat. or Sun. afternoons

### Comprehensive volunteer program

- Volunteer leverage use and connections

### Enhanced hospitality

#### Socialize – revenue generation – nutrition – social food

- Espresso bar
- Modernize food program
- Meal service revision – meal options, alternative service areas
- Dinner services
- Cooking classes for 1-2 people

### Enjoyable provocative lifelong learning curriculum

#### Cultural programming and lifelong learning programs

- Film festival (eco)
- Book club
- TED Talks on languages, philosophy – virtually and otherwise
- Onsite garden area – raised beds, re-landscaping
- Business development for entrepreneurs
- Living history – mentoring, career, social skills, encore careers, match participants
- Global issues – volunteer tie-in to trip/tour (wellness tour)
- The academy

### Ongoing assessment

#### Know your customers' needs and link to customers for continuous evaluation process

- Set up process to engage specific audiences
- Networking with businesses and people
- Addressing health issues due to media
- Technical skills

### Greater public awareness

#### Self-serving promotion

- Access – bring people and awareness of LOACC
  - Connecting generations to farming (Luscher), sports, tennis, golf, other facilities
- Expanded human services
- Angie's List model (service referral resource)
- Physical outreach
- Charging stations (car, device)
- Taking services out of building

### Holistic safe and secure access to facilities

- Building expansion and/or remodel
- Transportation services – walk, connections, alternative
- Expand building ours – A.M. and afternoon for adults, P.M. and weekends for families
- Time blocking programming appropriate to demographics
- Programming age 14+

Other ideas not categorized

Change awareness management system

Resource center for issues related to aging in LO

Mainstream people with dementia

High touch, high tech

**LOACC MISSION & VISION PUBLIC SURVEY RESULTS – JAN. 20, 2015**

- 4000 emails; 100 Responses
- Volunteers, members, supporters, connected in some way (took class)
- Values that have been developed and approved

N=100

**QUESTION 1**

Q1 Thank you for providing your perspective on this important LOACC work. Please review this draft mission statement –

MISSION STATEMENT: The Center provides citizens ways to enrich their lives.

Please mark your level of agreement with the following statement:” I believe this mission statement can guide the center towards success.”

Answered: 98 Skipped: 2

Agree	– 68.37%
Neutral	– 19.39%
Disagree	– 12.24%

**Clustered Comments:**

- Actions (things participants want)
- **Structural issues**
- **Wordsmithing**
- **Generic, Vague, etc....**
- **Age issue**
- Kudos to the center
- N/A

**Actions (things participants want):**

City needs to work toward transporting non-drivers to Tuesday and Thursday activities.

The center is not open hours that people who work full time can utilize

The location and design of the facility hinders the number of participants. Read the 6/11/07 report on proposed Community Center and '07 A Community Vision for Aging in Lake Oswego.

Tax, computer classes very helpful to me.

LOACC will provide the space and structure to inspire adult residents to improve their health and wellbeing through learning, networking, and collaborating.

**Structural issues**

A mission statement should have more verbs telling what its mission is. Your draft statement describes what you actually doing but makes no reference or link to what you intended to do (i.e., your mission).

I would prefer that the statement addresses the what, how and why.

If we don't know where we are going, how will we know when we get there?

I think you could focus this more by ...or being more specific about types of serve: lifestyle support or community connections,

Such a statement should be short, brief, and general.

**Wordsmithing**

Wording: provide life-enriching activities

Perhaps give some definition to "enrich"

**Generic, Vague, etc....**

I am concerned that the statement is too vague.

Seems it needs to be more specific on how lives will be enriched. WHAT will be enhanced- mind, body, spirit, living, financial, educational, ????

It is too vague...

A bit too generic

It doesn't say anything.

Too general or generic. Nothing specific about how you plan to do this.

**Age issue**

...plus the center targets a special age group of citizen rather than all 50+ citizens.

Citizens implies all citizens, including children. Suggest adult citizens or senior citizens.

Senior should be added

I think you could focus this more by specifying the age group served at the ACC...

Perhaps add the senior or older embers of the community.

**Kudos to the center**

I think the adult center is already a success.

Exercise classes and music classes are great!

Really enjoyed the walking class last fall, enjoyed the companionship

Great to meet new friends, different cultures

It does offer thing for kids and families.

**N/A**

Too bad. Not enough space in this box to explain what I'd like

Sounds good but the reality of restricted access of members to unused classroom space negates this.

**QUESTION 2**

Q2 Please review this draft vision statement –

**VISION STATEMENT:**

Generations of citizens in our community come to the LOACC to have warm, welcoming and transformational experiences. We enrich, amaze, and excite members of all ages with challenging programs and classes, a dynamic multicultural restaurant, and staff who create positive experiences for all.

Generations of citizens in our community come to the LOACC to have welcoming and transformational experiences. We enrich and excite members of all ages with programs and classes that meet community needs, and staff who create positive experiences for all.

Please mark your level of agreement with the following statement: "This vision statement aligns with the mission and will serve to guide the center towards success."

Answered: 98 Skipped: 2

Agree	– 56.12%
Neutral	– 27.55%
Disagree	– 16.33%

#### Clustered Comments:

- **Wordsmithing & Structure**
- **Age issues**
- Insufficiencies of the Center
- Restaurant Challenges
- Implementation challenges (non restaurant)
- **Questions**
- N/A or misunderstanding
- Kudos to the center

#### Wordsmithing & Structure

- Lots of words.
- Good thoughts, but too wordy.
- It seems a bit overstated, and
- I would change last statement to read: "and positive experiences for all created/delivered by an engaging (or some similar word) staff.
- A vision speaks to creating a positive future outcome, not the current status quo.
- I would stop after the first sentence.
- Transformational? In what way?
- Substitute the word "engage" for "amaze".
- Experience ... Or at least add those who come to the center. Currently multicultural seems to apply only to staff and the restaurant!
- "Generations of citizens" etc. is self-serving and backward looking. Second para seems to say what needs to be said.
- Amaze? No excite? No enhance? Yes enrich? Yes
- Too smarmy. LOACC envisions itself as a space to build an adult community in the city of Lake Oswego.
- There is no real unifying connection between the two. First should contain "general" specifics the second specific specifics. Example first - The center provides support, education and enrichment for the community with special
- Attention to senior citizen. Second - to support the adult community we provide... to educate we provide training in.... to provide enrichment we provide programs in.
- You don't mention supportive programs and services from staff
- This is HOW you accomplish you vision. This should be the statement following you vision statement.

**Age issues**

- Emphasis on: all ages
- Is not clear what age persons may enroll.
- Is the ACC broadening from serving primarily the 50+ community?
- The statement makes me wonder if there will be programs for youth?
- Senior should be added

**Insufficiencies of the Center**

- There is not enough room to meet the needs of those who wish to gather and practice different exercises on their own time.
- I am a new member and am in excellent physical health for my age (72) I haven't experienced challenge in your programs yet.
- Needs better communications by staff
- My experiences at the front desk have been less than warm and welcoming - They're usually too busy discussing business matters with each other or answering the phone.

**Restaurant Challenges**

- Challenging especially if a restaurant of what proportions were to be included.
- The center is not and should not be a restaurant. Who ever composed this statement does not understand the purpose of the LOACC. Does this statement reflect any knowledge of the restaurant retail business, also obviously not.

**Implementation challenges (non restaurant)**

- Actual practical implementation of an all ages would be challenging especially if a restaurant of what proportions were to be included.
- This vision needs a business plan.

**Questions**

- I don't know why the leaders do not think it is successful now?
- Does any of this mean convenient and affordable?
- Do you intend to provide for children as well?
- How far into the future is this "vision"?
- Amaze, and dynamic multicultural restaurant might take a while to achieve.
- Are there ethnic foods served in restaurant?

**N/A or misunderstanding**

- The opening word "Generations" make it sound
- I am a fairly new member and I have not use the center yet.
- I have only attended one event but hope to be more active & involved in the coming year 2015
- Sounds good but the reality of restricted access show this not to be a true vision.
- Broad expansionary statement,

**Kudos to the center**

- It's a terrific setting for a variety of programs & classes.
- Variety of services is wonderful
- My personal experience with the Center is limited to Bridge (Monday & Tuesday PM) - this is excellent activity that I am grateful is offered by my local Adult CC.

**Mission Statement**

A *mission* can be defined as “an important goal or purpose that is accompanied by strong conviction,” and a *statement* can be defined as “a single sentence or assertion.”

It should state the purpose of why your business exists in a convincing manner in no more than a single sentence, the shorter, the better, such as:

**DO’S**

- Create something that connects with both employees and customers
- Make it about you
- Highlight your value proposition
- Make it tangible
- Mention a specific goal

**DON’TS**

- Make it useless
- Make it long
- Make it generic
- Make it confusing

**EXAMPLE OF A BAD MISSION STATEMENT: GENERAL MOTORS**

“G.M. is a multinational corporation engaged in socially responsible operations, worldwide. It is dedicated to provide products and services of such quality that our customers will receive superior value while our employees and business partners will share in our success and our stockholders will receive a sustained superior return on their investment.”

**EXAMPLE OF A GOOD MISSION STATEMENT: NIKE**

“To bring inspiration and innovation to every athlete in the world.”

**VISION STATEMENT**

Start by defining what the word *vision* means. It is “the act of anticipating that which will be or may come to be.”

So, what impact do you envision your business having on the world once you’ve achieved your vision? Now that you’re thinking that far down the road about your business, put it as an assertion. You can have more than a single sentence for this one, but we don’t recommend going over three at most. Gloss it over to make sure that anyone who comes in its proximity feels any one of the following emotions; inspiration, hope, commitment, and awe.

Just like the mission statement above, here are so do’s and don’ts along with some examples:

**DO’S**

- Make it compelling
- Make it detailed
- Paint the intended end outcome
- Highlight why your company exists
- Make it the outcome of your mission statement

**DON’TS**

- Make it bland
- Make it generic

- Make it uninspiring
- Make it obviously unreasonable

**EXAMPLE OF A BAD VISION STATEMENT: DELL**

“To be the most successful computer company in the world at delivering the best customer experience in markets we serve.”

**EXAMPLE OF A GOOD VISION STATEMENT: AMAZON**

"Our vision is to be earth's most customer centric company; to build a place where people can come to find and discover anything they might want to buy online."

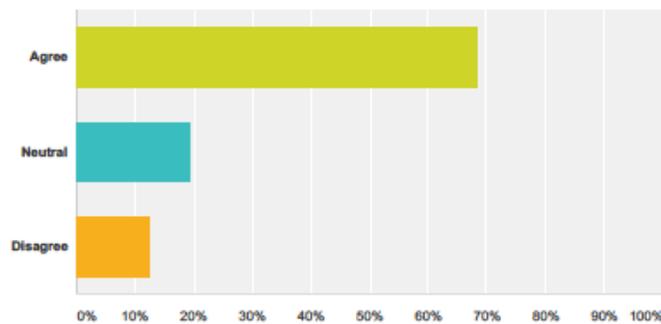
**SURVEY DATA SNAPSHOTS**

Lake Oswego Adult Community Center Vision Mission Survey

SurveyMonkey

**Q1 Thank you for providing your perspective on this important LOACC work. Please review this draft mission statement -MISSION STATEMENT: The Center provides citizens ways to enrich their lives. Please mark your level of agreement with the following statement: "I believe this mission statement can guide the center towards success."**

Answered: 98 Skipped: 2



Answer Choices	Responses
Agree	68.37% 67
Neutral	19.39% 19
Disagree	12.24% 12
<b>Total</b>	<b>98</b>

#	Write any comments here:	Date
1	city needs to work toward transporting non-drivers to Tuesday and Thursday activities.	1/13/2015 11:45 AM
2	too vague	1/11/2015 4:16 PM
3	A mission statement should have more verbs telling what its mission is. Your draft statement describes what you actually doing but makes no reference or link to what you intended to do (i.e., your mission).	1/11/2015 3:27 PM
4	Wordng: provide life enriching activities	1/11/2015 8:20 AM
5	I am concerned that the statement is too vague. I would prefer that the statement addresses the what, how and why.	1/10/2015 10:01 AM
6	Seems it needs to be more specific on how lives will be enriched. WHAT will be enhanced- mind, body, spirit, living, financial, educational, ????	1/9/2015 12:41 PM
7	It is too vague plus the center targets a special age group of citizen rather than all 50+ citizens.	1/8/2015 6:15 PM

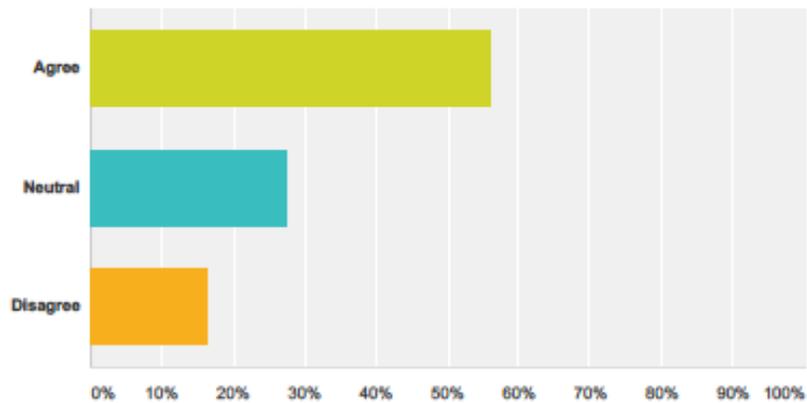
Lake Oswego Adult Community Center Vision Mission Survey

SurveyMonkey

8	I think the adult center is already a success.	1/8/2015 5:50 PM
9	If we don't know where we are going,how will we know when we get there?	1/8/2015 3:05 PM
10	a bit too generic	1/8/2015 3:02 PM
11	The center is not open hours that people who work full time can utilize	1/8/2015 1:53 PM
12	too bad. Not enough space in this box to explain what I'd like	1/8/2015 1:31 PM
13	Citizens implies all citizens, including children. Suggest adult citizens or senior citizens.	1/8/2015 12:44 PM
14	The location and design of the facility hinders the number of participants.Read the 6/11/07 report on proposed Community Center and '07 A Community Vision for Aging in Lake Oswego..	1/8/2015 12:41 PM
15	exercise classes and music classes are great!	1/8/2015 12:09 PM
16	I think you could focus this more by specifying the age group served at the ACC or being more specific about types of serve: lifestyle support or community connections, etc	1/8/2015 12:08 PM
17	It doesn't say anything.	1/8/2015 10:57 AM
18	Senior should be added	1/8/2015 10:48 AM
19	Tax, computer classes very helpful to me.	1/8/2015 10:26 AM
20	really enjoyed the walking class last fall, enjoyed the companionship	1/8/2015 10:17 AM
21	great to meet new friends, different cultures	1/8/2015 10:15 AM
22	LOACC will provide the space and structure to inspire adult residents to improve their health and wellbeing through learning, networking, and collaborating.	1/8/2015 10:10 AM
23	Too general or generic. Nothing specific about how you plan to do this.	1/8/2015 10:04 AM
24	Perhaps give some definition to "enrich"	1/8/2015 10:00 AM
25	Such a statement should be short, brief, and general. Perhaps add the senior or older embers of the community. It does offer thing for kids and families.	1/8/2015 9:39 AM
26	Sounds good but the reality of restricted access of members to unused classroom space negates this.	1/8/2015 9:33 AM

**Q2 Please review this draft vision statement -VISION STATEMENT: Generations of citizens in our community come to the LOACC to have warm, welcoming and transformational experiences. We enrich, amaze, and excite members of all ages with challenging programs and classes, a dynamic multicultural restaurant, and staff who create positive experiences for all. Please mark your level of agreement with the following statement: "This vision statement aligns with the mission and will serve to guide the center towards success."**

Answered: 98 Skipped: 2



Answer Choices	Responses
Agree	56.12% 55
Neutral	27.55% 27
Disagree	16.33% 16
<b>Total</b>	<b>98</b>

#	Write any comments here:	Date
1	There is not enough room to meet the needs of those who wish to gather and practice different exercises on their own time.	1/13/2015 11:45 AM
2	Broad exapansionary statement, actual practical implementation of an all ages would be challenging especially if a restaurant of what proportions were to be included. This vision needs a business plan.	1/12/2015 2:34 PM

Lake Oswego Adult Community Center Vision Mission Survey

SurveyMonkey

3	the center is not and should not be a restaurant. who ever composed this statement does not understand the purpose of the LOACC. does this statement reflect any knowledge of the restaurant retail business, also obviously not.	1/12/2015 11:53 AM
4	The opening word "Generations" make it sound	1/11/2015 3:27 PM
5	I am a new member and am in excellent physical health for my age (72) I haven't experienced challenge in your programs yet.	1/11/2015 1:59 PM
6	Lots of words.	1/11/2015 8:20 AM
7	Good thoughts, but too wordy.	1/10/2015 2:02 PM
8	Emphasis on: all ages	1/9/2015 4:02 PM
9	I would change last statement to read: "and positive experiences for all created/delivered by an engaging (or some similar word) staff.	1/9/2015 12:41 PM
10	needs better communications by staff	1/9/2015 11:55 AM
11	A vision speaks to creating a positive future outcome, not the current status quo.	1/8/2015 6:15 PM
12	I don't know why the leaders do not think it is successful now ?	1/8/2015 5:50 PM
13	My experiences at the front desk have been less than warm and welcoming - They're usually too busy discussing business matters with each other or answering the phone.	1/8/2015 4:59 PM
14	I am a fairly new member and I have not use the center yet.	1/8/2015 4:53 PM
15	I would stop after the first sentence.	1/8/2015 4:45 PM
16	It seems a bit overstated, and is not clear what age persons may enroll.	1/8/2015 4:36 PM
17	It's a terrific setting for a variety of programs & classes.	1/8/2015 4:22 PM
18	I have only attended one event but hope to be more active & involved in the coming year 2015	1/8/2015 3:05 PM
19	transformational? In what way?	1/8/2015 3:02 PM
20	Does any of this mean convenient and affordable?	1/8/2015 2:31 PM
21	see above comment	1/8/2015 1:31 PM
22	See previous comment. Do you intend to provide for children as well?	1/8/2015 12:44 PM
23	Note comments for Mission Statment	1/8/2015 12:41 PM
24	variety of services is wonderful	1/8/2015 12:09 PM
25	Is the ACC broadening from serving primarily the 50+ community? The statement makes me wonder if there will be programs for youth?	1/8/2015 12:08 PM
26	Substitute the word "engage" for "amaze".	1/8/2015 11:12 AM
27	My personal experience with the Center is limited to Bridge (Monday & Tuesday PM) - this is excellent activity that I am grateful is offered by my local Adult CC.	1/8/2015 10:59 AM
28	experience ... Or at least add those who come to the center. Currently multicultural seems to apply only to staff and the restaurant!	1/8/2015 10:59 AM
29	"Generations of citizens" etc. is self-serving and backward looking. Second para seems to say what needs to be said.	1/8/2015 10:57 AM
30	amaze?no excite?no enhance?yes enrich?yes	1/8/2015 10:52 AM
31	Senior should be added	1/8/2015 10:48 AM
32	How far into the future is this "vision"? Amaze, and dynamic multicultural restaurant might take a while to achieve.	1/8/2015 10:36 AM
33	Are there ethnic foods served in restaurant?	1/8/2015 10:26 AM
34	Too smarmy. LOACC envisions itself as a space to build an adult community in the city of Lake Oswego.	1/8/2015 10:10 AM

Lake Oswego Adult Community Center Vision Mission Survey

SurveyMonkey

35	There is no real unifying connection between the two. First should contain "general" specifics the second specific specifics. Example first - The center provides support, education and enrichment for the community with special attention to senior citizen. Second - to support the adult community we provide....., to educate we provide training in....., to provide enrichment we provide programs in...	1/8/2015 10:04 AM
36	You don't mention supportive programs and services from staff	1/8/2015 9:48 AM
37	This is HOW you accomplish you vision. This should be the statement following you vision statement.	1/8/2015 9:39 AM
38	Sounds good but the reality of restricted access show this not to be a true vision.	1/8/2015 9:33 AM

**NCOAA FEEDBACK TO ANN ADRIAN – NOV. 26, 2014**

**From:** NCOA Crossroads [mailto:alerts@hoop.la]  
**Sent:** Wednesday, February 04, 2015 9:41 AM  
**To:** Adrian, Ann  
**Subject:** Reply By Joe Wasyluk: Research of the Effectiveness of Senior Center par...

== To reply by email, write above this line. ==



**Hello, Ann Adrian:**

We're sending you this notification because you are either following the forum, the content, or the author listed below.

**NEW REPLY TO TOPIC**

**SUBJECT:** [Research of the Effectiveness of Senior Center participation](#)  
**REPLY BY:** [Joe Wasyluk](#)  
**IN:** [Senior Centers Emails](#)  
**GROUP:** [Senior Centers](#)



@Ivy, I have been doing research work in this area for approx. 5-Years in Canada. I am very concerned about the current senior centers and the 'new age' senior that is highly educated with various resources. There is no plan at the present time to deal with the 90% of seniors that don't even visit their community based senior centers. In my own research I found that a different concept is required eg.Lifelong Learning Centers c/w modern deli food and computer WI-fi connections. We need 'community centers' where seniors can discuss with like-minded people what they can still contribute to their own community. I have a Blog with 37 articles that deals with subjects pertaining to senior centers and seniors issues, attitudes, etc. My Blog

address is: <http://seniorpreneur.wordpress.com> My other resource is a new book that I self-published. The title of the book is: Encore! Encore! Seniors (50 Plus) As Entrepreneurs: Their Time Has Come. I have a Free Chapter on the Amazon site. [www.amazon.com/Encore-Seniors-...eneurs/dp/1493793608](http://www.amazon.com/Encore-Seniors-...eneurs/dp/1493793608) Please understand that I still believe in senior centers for people that want to fellowship and maybe learn some basic skills for the fun of it and NOT for profit. However; I know that there are the comfortable seniors that escape as Snowbirds to live a leisure lifestyle. I also know other seniors (highly educated) that want to be challenged mentally much more (including myself) than what is presently available at a local senior center. The other scary thing is that the generation following the Boomers is much more Tech savvy and they will follow their 'smart phones' wherever they will take them; and I'm convinced that the community senior center will not be on their minds unless of course they visit their parents there.

I will be pursuing the Seniorpreneur Project for at least another 5-Years. At the present time I am taking at least a 1-Year sabbatical from my blog writing because in Canada we have a long-time to go before we 'catch up' to some of the other countries in this coming senior transformation. Any comments here that anybody has will be much appreciated. Thanks!

### VISION DEVELOPMENT NOTES – NOV. 26, 2014

"Sustain, enhance and transform the quality of life for the community."

**The Center engages, enriches and cares for our citizens and community. (I like this one very much)**

Vision Draft

**The LOACC is the cornerstone for inspiring and enriching life-long experiences.**

Then I decided to see if I could replace enrich with something else so:

**The Center is the cornerstone for celebrating life-long experiences**

The Center is the cornerstone for inspiring and generative life-long experiences.

#### Values

Stewardship **(Caring for People and Environment)**

Inspiring Connectivity **(Building Community)**

Creative engagement **(Enriching Lives)**

**From:** D&M Freeman  
**Sent:** November 19, 2014 9:27 AM  
**To:** Adrian, Ann  
**CC:** Shane Sasnow  
**Subject:** Re: meeting and notes

Hi Ann,

I thought we had a very productive meeting yesterday. And Maria did a fabulous job with the notes. Below are some thoughts/questions that I hope can be helpful. When writing these, don't feel pressure to get it exactly on target right off. I write many versions of statements and then mix and match pieces to come up with the wording that makes me feel good. Another important trick I use is to put myself in the shoes of my audience to ask, "How do I interpret this information coming from the LOACC?" I'm happy to take a look at some drafts any time and provide feedback. Also, if you feel like you're hitting the wall on this we can chat about it by phone or even get together for a short time to kick things around.

### **Draft mission statement**

"Sustain, enhance and transform the quality of life for the community."

- "Enhance" and "transform" are close in meaning/purpose. Are both words needed? (Enhance likely would be perceived as positive.)
- If transform is retained, would you like to qualify it as "positively transform" for clarity? How do you think citizens would interpret your use of transform—controlling/manipulative or well-meaning change?
- Is the word "community" meaningful enough? Or are you really serving the "members of our/the community" or "individuals?"
- Does this statement reflect how the LOACC is committed to responsiveness to the needs of the community and how it embraces inevitable and necessary change?
- Does this statement easily inspire a list of values? If so, that's a good sign that it's on target.
- Once you establish the wording that captures your mission, can you say that it is the foundation of everything the LOACC does and the role of everyone who works and volunteers there? If so, you have a meaningful mission statement and are taking ownership of it.

### **Values**

- Core values are sort of the "rules you live by" and apply to everything you do. Does the current list fulfill that promise?
- Think from the perspective of your audience and ask if you're missing anything.
- Are each of these values fully supporting your mission statement? Do they align?
- What do you value about the work you do and the impact that work has on individuals' lives?
- If your members were surveyed, would these be the types of words they would use to describe your function in the community and, most importantly, how they'd describe the actions/behaviors/image of your staff and volunteers?

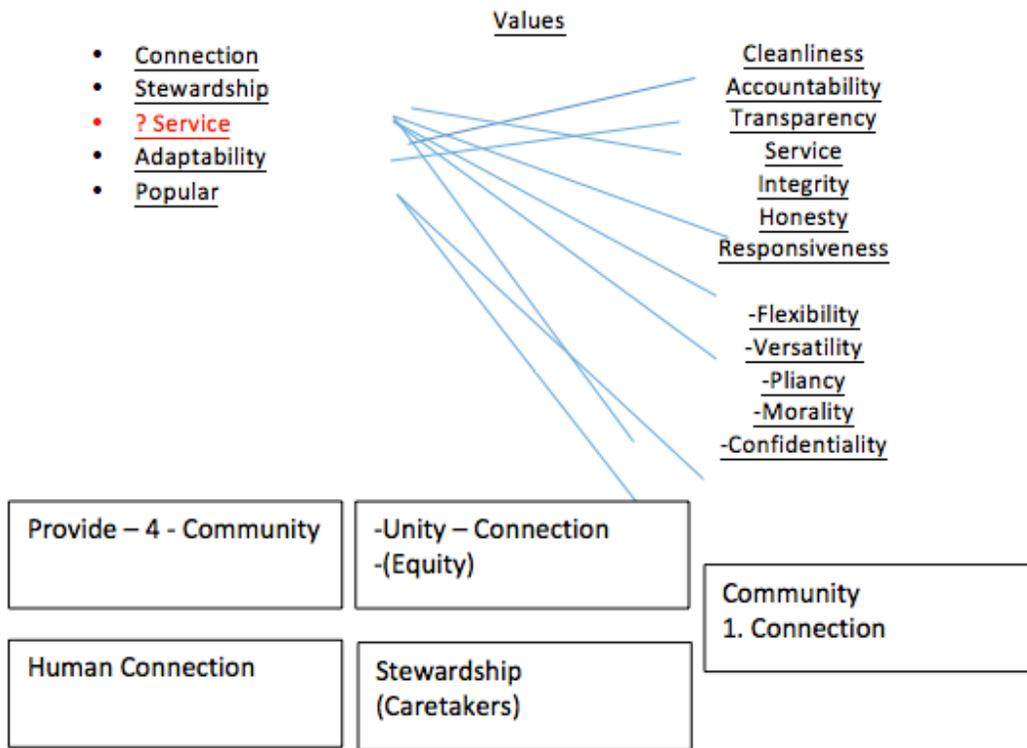
### **Vision**

- If the LOACC were to perform its function perfectly, how would you describe the results? What would be the impact on the community?
- What is it you ideally wish to achieve? What's your ultimate goal?
- You want to be realistic (you can't eliminate hunger, homelessness, unhappiness, illness, etc.) but you can have a vision that really pushes the assumed boundaries of "being realistic." More is possible than we typically imagine. Can you devise a vision that sets the bar high?

**VISION DEVELOPMENT NOTES – NOV. 18, 2014**

Inspire	Aspire	Necessary
Welcoming Celebrate Contribute Enrich Quality Service Energetic Dynamic Wellness	Nurture Accommodating Upbeat Respectful Holistic Intergenerational Community Results Inspiring Welcoming Changing Contribute Service	Food Focal Point Community Contribution Holistic All Encompassing Everybody Ever Changing Learning Growth

<ol style="list-style-type: none"> <li>1. Celebrate life</li> <li>2. Holistic (___)</li> <li>3. Focal point</li> </ol>	<ol style="list-style-type: none"> <li>1. I'm personally inspired by service we do here: __ Health, Fitness, Wellness</li> <li>2. I'm very aspiring the organization <u>contribute</u> the community.</li> <li>3. Its absolutely necessary learning culture of personal growth to community.</li> </ol>	<p><b>Inspire</b> Contribute to community to enrich body and soul</p> <p><b>Aspire</b> Connect to intergenerational community thru staff</p> <p><b>Necessary</b> Contribute to the community together</p>
<p><b>Inspire</b> Open, welcome place where we connect.</p> <p><b>Aspire</b> Accommodating, upbeat place that is respectful with nurturing staff.</p> <p><b>Necessary</b> Good food</p>	<ol style="list-style-type: none"> <li>1. Organization: Inspiring high quality service</li> <li>2. Aspiring: To achieve variety of programs and activities that produce results, are inspiring and meet the need of the community.</li> <li>3. Necessary: Holistic, focal point, enrich</li> </ol>	<ol style="list-style-type: none"> <li>1. Dynamic Respectful Energetic</li> <li>2. Intergenerational Changing opportunities Welcoming meeting place</li> <li>3. All encompassing Ever changing</li> </ol>



Whom Do We Serve?

<p>Who should/will we serve?</p> <ul style="list-style-type: none"> <li>- All age groups – residents</li> <li>- All abilities</li> <li>- Currently focused on 50+</li> <li>- Super seniors</li> </ul>	<ol style="list-style-type: none"> <li>1. The community as a whole</li> <li>2. Emphasis on adults and lifelong experience</li> <li>3. Those in need.</li> </ol>
<p>Who should we serve?</p> <ul style="list-style-type: none"> <li>- All residents</li> <li>- Disables</li> <li>- Fit wise</li> <li>- Social seekers</li> <li>- Volunteer opportunities</li> </ul>	<p>Who should we serve? Age or place, interest</p> <ul style="list-style-type: none"> <li>- Everyone who is an adult and lives in Lake Oswego or around.</li> </ul>
<ol style="list-style-type: none"> <li>1. Broad spectrum of the LO community (21+) without disconnections from current members.</li> <li>2. Needs based population that wouldn't be served by other entities.</li> </ol>	<ol style="list-style-type: none"> <li>1. Current group</li> <li>2. Anyone drawn to the activities, etc... over age 18</li> <li>3. Grandparents/grandkids</li> </ol>

The Mission of the LO(A)CC is to...

- Enhance community well being
- & provide service to those in need
- & provide support residence (to our community)

Sustain, enhance & transform (the quality of life) for the community  
~~-Of Over People-The~~

<p>Short/Simple                  Action Oriented                  Embraces levels of change                  All about the community</p>	<p>Commonwealth                  Hamlet</p>	<p>Lake Oswego                  People                  Citizens                  Families &amp; Individuals                  Users                  Society                  Colony                  Tribe                  Village                  Stomping ground                  Body                  Politics                  Public</p>
--	---	---

60- H.S. (i.e. support groups), fitness, services, rec  
 25-Cultural/Per growth, fitness  
 15-Social opps., services

-Services/health, fitness & wellness & aging  
 -Learning culture & personal growth  
 -Social opportunities & events

1. Services/Support Groups  
 2. Health, fitness, wellness, aging.  
 3. Learning, culture, personal growth

**What we do already we do it well:**  
 1. Human services & support systems  
 2. Health & Fitness opportunities  
 3. Classes – Activities

**What we could improve upon:**  
 1. Nutrition program  
 2. Revamp activities (bridge, games etc...)  
 3. Events-classes

**Future Fun:**  
 1. Giant room  
 2. Pool/Spa  
 3. Locker room

**What we do already**  
 -Services – Support Groups – would be additional

**What we need to do**  
 -Social opportunities & events & social engagement  
 -Academic classes- Continuing education

-Learning, culture of personal growth  
 -Social opportunities  
 -Lifelong learning adult classes  
 -Computer classes  
 -Fitness

**FUTURE VISION WORKSHEET – OCT. 21, 2014**

Lake Oswego Adult Community Center  
 Future Vision Worksheet

**Work Session: Mission**

A mission describes whom the organization serves and what they do for them.

**Current Mission:** The LOACC is a community focal point that celebrates aging through creative, inspiring and exciting opportunities that promote independence, as well as physical and emotional wellness.

*Whom should the LOACC serve?*

*What should the LOACC provide for them (products, services, experiences, outcomes, etc.)? ...and why?*

- 1.
- 2.
- 3.

**Work Session: Vision Statement & Goals**

A vision statement describes the ideal future state as if it already exists, in present tense. Visionary goals are what must be created to make the vision real.

**Current Vision Statement:** The Center provides a dynamic, friendly and indispensable venue for the community.

*How might you change the current vision statement (add to it, take away from it, etc.)?*

*What would you like to see in place at LOACC in 5-10 years?*

- 1.
- 2.
- 3.
- 4.
- 5.

**Work Session: Values**

An organization’s values are the principles and standards they hold. Values guide behavior, decision-making, and action.

Current values:

- Integrity
- Honesty
- Caring
- Compassion
- Accountability
- Adventure
- Cleanliness

What are the top 3 values LOACC should hold?

1. \_\_\_\_\_

Behavior or Action that would demonstrate this value:

2. \_\_\_\_\_

Behavior or Action that would demonstrate this value:

3. \_\_\_\_\_

Behavior or Action that would demonstrate this value:

**What Else?**

Please write anything else you wish LOACC to consider as we develop the vision of our future:

**Lake Oswego Adult Community Center  
Future Vision Worksheet Data**

**Work Session: Mission**

A mission describes whom the organization serves and what they do for them.

**Current Mission:** The LOACC is a community focal point that celebrates aging through creative, inspiring and exciting opportunities that promote independence, as well as physical and emotional wellness.

*Whom should the LOACC serve?*

1. A gathering place for the 50+ community that fosters independence and strengthens physical and emotional well-being.
2. People 50[SS1]+
3. Seniors – at least 50+ for anyone who wants to come
4. Adults 50 and over in the L.O. Community
5. Adults – 40 to 50 (fifty is the new 40[SS2]!)
6. Primarily 50+ with inclusion of all age groups in specific events
7. Adults[SS3]
8. Entire Adult Community
9. The Community no age limits[SS4][SS5]

*What should the LOACC provide for them (products, services, experiences, outcomes, etc.)? ...and why?*

**Clustered Topics (# = number of support ideas)**

- Learning, culture and personal growth (7)
- Social Opportunities & Events – Community (7)
- Health, Fitness, Wellness & Aging (5)
- Opportunities to contribute (3)
- Support groups (3)
- Services (2)
- Recreation (2)

**Cluster groups data:**

Learning, culture and personal growth (7)

- Academic classes – high culture (i.e. museums)

- Lifelong learning/adult classes
- Learning opportunities
- Academic classes, increased cultural opportunities
- Continuing education
- Cultural (arts, wine, walk, culinary, fashion) – One day events- Travel programs (international)
- Learning Opportunities

#### Social Opportunities & Events – Community (7)

- Structure and person to coordinate storytelling night, open mic –song, poem etc..
- A safe warm space for events
- Community – sense of place, welcoming, hospitable
- Social engagement/Sense of Community
- A sense of being part of the community
- Social engagement
- Social (recreational) activities to engage in social interaction

#### Health, Fitness, Wellness & Aging (5)

- Broader fitness facility (to attract the newly retired)
- Fitness, health and wellness – nurturing a sense of community
- wellness/independence
- Mental and physical wellness and good food
- Programs that deal with aging in a positive way

#### Opportunities to contribute (3)

- Opportunities to learn and contribute
- Social needs of all adults – outreach to the community
- Partner with community group (i.e. AA or single parents etc...)

#### Support groups (3)

- Wellness (support group) activities; fitness, health, wellness to maintain independence
- Support Groups for health related issues
- support groups for health issues

#### Services (2)

- Human Services – wellness and interdependence – connect to resources
- Human service for support

#### Recreation (2)

- Recreational opportunities
- Recreational activities for social interaction

### Work Session: Vision Statement & Goals

A vision statement describes the ideal future state as if it already exists, in present tense. Visionary goals are what must be created to make the vision real.

**Current Vision Statement:** The Center provides a dynamic, friendly and indispensable venue for the community[SS6].

*How might you change the current vision statement (add to it, take away from it, etc.)?*

#### DRAFT VISION STATEMENT[SS7]

The LOACC is an all encompassing, fun, dynamic, indispensable, friendly, open, welcoming meeting place and building where we connect to celebrate our lives and contribute to our community together, with lots of people. It has holistic high quality services and an up beat, non-judgmental, energetic, receptive,

respectful, accommodating, nurturing staff with positive attitudes, who provide great customer service. We provide on-going and ever-changing opportunities for adults to connect to the intergenerational LO community through the staff, child-care, good food, and the coffee shop.

- ~~1. Center provides welcoming and up beat presence to all coming into the center and provide high quality services.~~
- ~~2. Words: on going basis, accommodating, respectful, ever changing, holistic, nurturing~~
- ~~3. Provide opportunities for adults to connect to the greater community. (We would like to add That all LO residents are aware of the benefits/services of the LOACC.~~
- ~~4. Take away dynamic and indispensable – The ACC provides a place to connect in celebrating our lives in our community together.~~
- ~~5. Provide opportunity for contribution, a welcome meeting place.~~
6. Intergenerational, Physically welcoming building that is all encompassing (kitchen, art studies, exercise)
7. Fun, staffed, child care in space available, coffee shop. Note: When one adds a number 50+ it limits.
- ~~8. Welcoming, open, upbeat, good food, non-judgmental, receptive, positive attitudes, customer service, lots of people, more energy of staff~~

*What would you like to see in place at LOACC in 5-10 years?*

#### **CLUSTERS**[SS8]

- Social: Celebration of life – Community contribution (7)
- Culture/Climate in the org (4)
- Volunteer opportunities (4)
- Intergenerational (3)
- Branding (3)
- Direction & Vision (3)
- Learning & growth opportunities (3)
- New Facilities (2)
- Expanded hours (2)
- Maintain the status quo (1)

#### **CLUSTER DATA**

Social: Celebration of life – Community contribution (7)

- A place to connect
- Poker nights
- More social opportunities
- Together as a community
- Celebrating life
- The human experience, a place to contribute to each other's lives
- Events that bring in the community as a whole.

Culture/Climate in the org (4)

- Hustle and bustle with discussions and laughter
- Time flies with comradely and laughter
- More usage
- Culture of deep respect and positive engagement with each other (+ various ages)

Volunteer opportunities (4)

- Better use of volunteers run at the front desk
- Better use of volunteers
- Promote volunteer opportunities to support ACC.
- Adult center volunteer groups out in the community. Not a central location but spread out through the community.

#### Intergenerational (3)

- Intergenerational activities, experiences
- Broader reach of programs (intergenerational) that can still cater to seniors (i.e. headsets for a cooking class that be checked out)
- Intergenerational adults

#### Branding (3)

- Re-brand (i.e. “community center”)
- Increased visibility
- Improve image and branding that stresses the full range of dynamic activities and opportunities.

#### Direction & Vision (3)

- More relevant
- A new director with more vision
- Implement new (or repurposed) ideas

#### Learning & growth opportunities (3)

- Expansion for new trends issues
- Travel
- Speakers/learning experiences

#### New Facilities (2)

- Pool
- New facilities (may be part of a larger community center)

#### Expanded hours (2)

- Expanded hours – evening and Sat. to accommodate families
- Expansion of activities into the evening to fit various lifestyles

#### Maintain the status quo (1)

- Maintaining current activities –

### **Work Session: Values**

An organization’s values are the principles and standards they hold.

Values guide behavior, decision-making, and action.

Current values:

- Integrity
- Honesty
- Caring
- Compassion
- Accountability
- Adventure
- Cleanliness

### **What are the top 3 values LOACC should hold?**

#### **Clusters**[SS9]

- Human Connection
- Altruism & Stewardship

- Provide for Community
- Accountability
- Positivity
- Living Well

### **Human Connection**

- Relationships,
  - Active outreach to elders, customer service.
- c. Caring and compassion.
  - a. Open doors to all adults, human services
- e. Inclusion
  - a. Inclusion, open the center to the community
- g. Inclusive
  - a. Facility to serve all, Input from all recipients, safe, all decades 50-100+, physically accessible
- e. Inspiration
  - b. Inspiring the community through activities
- g. Genuine connections
  - c. Intergenerational, listen to recipient need

### **Altruism & Stewardship**

- e. Compassion
  - a. Compassion, human services
- f. Compassion
- b. Caring
  - a. Having programs that mirror the needs of the community and providing a compassionate, friendly, inviting environment
- i. Safe place
  - a. Open, non-judgmental, communicate, share information
- c. Good Stewards of the community's resources and people
  - a. Quality human services, fiscally responsible. For example, Ryan is in charge of natural areas and he has to be a good steward which means he protects the natural areas, provides a place for people to connect with nature, education, and cost, he takes it all into account.

### **Provide for Community**

- d. Meet the needs of the adult community
- c. Relevant
  - a. Moving forwards while keep our connection to the past.
- b. d. Provide community environment
- b. Cleanliness
  - a. Maintaining a clean, healthy environment that is safe for individuals with compromised immune systems. Having cleaning products (hand wipes, hand sanitizer) readily available (already in place)
- i. Good effective communication
  - a. Between staff of all levels, verbally and in print

### **Accountability**

- b. Accountability

- a. Transparent reporting of activities, finances, actions etc.. and being open to answering questions from various publics (open-door policy)
- b. f. Accountability
- c. h. Trustworthy

### Positivity

Positive!

- a. "Hello" to everyone walking into the building,
- i. Customer service
  - a. Welcome all who come, greet with a smile

### Living Well

- h. Wellness
- h. Fun
  - b. Parties
  - d. Improve health and wellness
    - a. Provide excellence and quality in all services rendered in the community
- f. Adventure
  - a. Discovery, growth, participation, dynamic, celebration, inspiration, purpose, contribution

### What Else?

Please write anything else you wish LOACC to consider as we develop the vision of our future:

- a. Continue to ask the questions.
- b. Leadership of the center, the current leadership drives the center in a positive direction.
- c. Thank you for opening this up to the public. We would like the opportunity to have a follow up meeting got review and discuss before finalizing. Survey broader community. Hasn't been done in 10+ years. Things change.
- d. Research options for grandparent's ability to participate in classes and/or interact with others at the center, i.e. 2 hours of free childcare. Consider that the space, set up of building is inhibiting use of ACC?

### SCRAP PAPER MEETING NOTES 1 – OCT. 16, 2014

Is a...

- Community focal point
- Celebrates ageing
- Creative, inspiring, exciting opportunities
- Promote independence
- Physical and emotional wellness

---

### Needs Analysis

1. Anticipate growth in Boomer population
2. What are needs of aging community – cognitive decline
3. Are needs changing? If so how? (e.g. medical care)
4. What would you like to see ACC do that it is not doing now?
5. What can the ACC do to improve?

- 
1. Revenue needs
  2. Decrease dependence on m...? funding
  3. Need new strategic plan – short time horizon
  4. Used to have more classes, education – retired professors
  5. PCC classes too expensive
  6. Adult Ed, more needed
- 

1. Adult recreational opportunities
  2. Lifelong learning
  3. Adult education
  4. Wellness
- 

#### Adults 50 and over in the LO community

---

Barb Jaeger

- Let them know of social engagement opportunities
  - Transportation for docs (Dr. appointments?), library
  - Add times of activities
- 

Succeed by:

- Meet changing needs of the LO adult community
  - Social networking, fraternity, sense of community
  - Image-branding
- 

- Recreational - ?
  - Arts, Crafts
  - Social sense of family
  - Inclusive and ? support
  - Independence
  - Life-long learning
- 

- Community focal point
  - Celebrate ageing
  - Inspiring opportunities
  - Promote independence
  - Physical and emotional wellness
- 

- It has created a culture that embodies succinct truthful heartfelt conversations to fulfill unique personal identities and interest
  - Visibility
  - Expanded hours
-

- Celebrate
  - Inspire
  - Wellness
  - Better services, quality (target market)
  - Mandatory membership
  - Recruit members
- 

- Trustworthy
  - Competitive
  - Reliable
  - Honest
- 

Vital to our humanity that who we are is a contributor

---

- Chasm between younger and older
  - Communication and understanding
  - Social media – get together
  - Words we use and words they use
  - HS students
  - Vital to our humanity
  - Inspiring
- 

- HS volunteers
  - Kids sometimes
  - Full serve restaurant 5-6 days a week
  - Storytelling
  - How do I keep growing?
- 

- Inspiring and exciting opportunities
  - Knitting
  - Card playing
  - Cooking classes
  - People sharing their skills and knowledge
  - Tutoring
  - Computer classes
  - Warmly greeted
  - Square dancing
- 

- Celebrate ageing
- Creative, inspiring opportunities
- Promoting independence, wellness
- Opportunities to grow
- Brain activity

- Inviting, welcoming
- Story telling night
- Open mic night
- Knitting
- Add different ages to interact
- Stir it up night
- Contests
- Contemplative quiet time room

---

A busy energetic group- all involved in various activities. Warm and people are energized

- Who to serve and how to serve them
- How people can feel like they are contributing
- How people can interact

- 
- Adventure – Discovery, Growth, Dynamic, Celebration, Inspiration
  - Inspiring connectivity
  - Community interaction
  - Participation
  - Purpose
  - Contribution
  - Vital to our humanity and human experience
  - Compassion
  - Meeting ourselves through each other

- 
- Olive said we need more philosophical classes
  - All adults 18 and older
  - All Lo residents are aware of the benefits and services of the LOACC
  - Board games-Pictionary, Outburst
  - Can we get some seniors to do a corn hole tournament with HS students? Seniors v. Seniors
  - Don't advertise 50+, we are really limiting ourselves.

---

### **Email Notes**

This person pasted some articles and a quote

#### **Perfect Pairing: Young People Teaching Seniors About Technology**

"Seniors who feel like today's technology has left them in the dust are hitching a ride with a philanthropic gaggle of students who, in their spare time, are helping older generations return to the fast lane with their iPods, iPads, smart phones and computers. A group of teenagers who never knew a world before computers launched Wired for Connections/Mentor Up...designed to help senior citizens understand the basics of modern-day devices." Incredible stories are surfacing from

these interactions. For example, the teens helped a 93-year-old man contact a Jewish friend he used to protect from bullying just before World War II and enabled a 69-year-old artist to find photographs of Monet's garden in Paris which she has dreamed of seeing all her life. Sean Butler, the 16-year-old who initiated this program, insists: "I've learned more during these sessions than I've taught...for me, just talking with them and learning their stories is what draws me back every time." { read more }

### Be The Change

If you feel comfortable with technology, ask an elder in your life if there is a technology you can help them learn. If you do not feel comfortable with technology, reach out to a loved one and give them an opportunity to share some of their knowledge with you.

Anyone who stops learning is old, whether at twenty or eighty. Anyone who keeps learning stays young. The greatest thing in life is to keep your mind young.

- Henry Ford -

- 
- Mission, vision, values. This is just standard rubric for consultants. There are way too many buzzwords that inhibit critical thinking.
  - The contribution of time to the project by the members and users should be valued and not just given lip service. Public participation is critical if LOACC is to be relevant to the community.
  - Who are LOACC's members or users right now? It looks like really old senior citizens. 26% are 85+, 29% are 70-79, 27% are 55-69, 5.4% are younger than 55, and 11% are unknown. Is that because of the meals on wheels program? The more important question is whether LOACC wants to change that mix or merely to expand the users in all age groups?
  - What are the products and services provided by LOACC right now? [See the matrix of onsite and outreach products and services.] First year psychology majors know that people are attracted to activities that give them pleasure.
  - Without prompting several people expressed a desire for a return of formal classes about serious matters. Would that be active co-learner sessions or the traditional pedagogy? Should LOACC be merely a social club or cheap county club for seniors? Resounding "no" to the last question. Should it be a place—like a country club—where business development activities occur? Again, a resounding "no."
  - Some values: fun, wellness, inspiration, safety, security. A fun place to gather with friends to enrich your body and soul. Two really good suggestions: free grandchild care for an hour or two and a coffee shop like Starbucks
  - Is location (place) a problem? It is hard to find and there is no access via public transportation. Any alternatives? What about satellite facilities?
  - Should LOACC expand into virtual space? Would seniors connect & engage in online?
  - Is the "venue" (that is, the facilities) a problem? The stairs are an obstacle, the elevator is not obvious, the rooms are small, and generally, the space is chopped up and doesn't flow. Is any renovation practical with public and/or private money? The parking lot is too dark for seniors to use at night. The primary things that inform the daily life of a senior citizen are safety and security. How does LOACC accomplish that with onsite services?
  - Is the demographic (50+) a problem? Why are the majority of users so very old? What attracts them? Does that repulse a potential younger user group? Do you care? Can LOACC be more fun

to attract a younger crowd? Would a younger membership create a more sustainable operation? Would you have to change the mix of activities to appeal to a younger membership?

- Dawn from P&R wanted to lower the minimum age to 40+ and to make the newsletter attractive to younger people. Would that increase membership or usage significantly? Would the mix of products & services have to be changed to make LOACC relevant to a younger membership?
  - Are the products & services a problem? What makes members want to come to LOACC? Why do people become members? Why do people not become members? Is it the stigma of being an “old folks” place? What products are not up to par? What services are missing or not up to par?
  - Are meals on wheels counted as use? Why is LOACC providing meals on wheels? Is that “mission-critical?”
  - Is communication of existence, products & services (that is, marketing & sales) effective? What is the value proposition from user’s perspective?
  - We talked about free child care for a limited time and a coffee shop as amenities that would attract users.
- 

My group in particular got stuck with the Vision portion. I didn’t write anything down like he had asked, but here were some of my thoughts I had while driving to work this morning.

#### Vision

- To meet the needs of the Adult Community in Lake Oswego
- To provide a variety of programs to the Adult Community
- To produce results (in particular with Fitness) but this can be with all classes

### SCRAP PAPER MEETING NOTES 2 – OCT. 16, 2014

#### We are (vision) – what we can be in the future

LOACC is a fun place to gather with friends, a focal point where we celebrate aging, promote independence, and contribute to our community to enrich our body and soul. It is filled with vital humanity and a variety of programs and activities that produce results, are inspiring, energetic, warm, and meet the needs of the Adult community in LO. All LO residents are aware of the benefits and services of the LOACC.

- ~~Community focal point~~
- ~~Celebrates ageing~~
- ~~Promote independence~~
- ~~Vital to our humanity that who we are is a contributor~~
- ~~HS students~~
- ~~Vital to our humanity~~
- ~~Inspiring~~
- ~~A busy energetic group all involved in various activities. Warm and people are energized~~
- All Lo residents are aware of the benefits and services of the LOACC
- ~~To meet the needs of the Adult Community in Lake Oswego~~
- ~~To provide a variety of programs to the Adult Community~~
- ~~To produce results (in particular with Fitness) but this can be with all classes~~
- A fun place to gather with friends to enrich your body and soul

**We provide (mission) – what participants would like to see**

- Education & learning
- Qualities of opportunities
- Wellness & Health (independence)
- New Facility
- Community
- Awareness: marketing, branding, & sales
- Accessibility

**Education & learning**

- formal classes about serious matters  
(co-learning sessions or traditional pedagogy)
- Used to have more classes, education – retired professors
- Adult Ed, more needed
- Lifelong learning
- Adult education
- Arts, Crafts
- Storytelling
- Life-long learning
- Knitting
- Card playing
- Cooking classes
- People sharing their skills and knowledge
- Tutoring
- Computer classes
- Square dancing
- Brain activity
- Story telling night
- Open mic night
- Stir it up night
- Contests
- Knitting
- Can we get some seniors to do a corn hole tournament with HS students?  
Seniors v. Seniors
- Perfect Pairing: Young People Teaching Seniors About Technology
- free grandchild care for an hour or two
- Olive said we need more philosophical classes
- Board games-Pictionary, Outburst

### **Qualities of opportunities**

- Creative, inspiring, exciting opportunities
- How do I keep growing?
- Inspiring and exciting opportunities
- Celebrate ageing
- Creative, inspiring opportunities
- Opportunities to grow
- Inviting, welcoming

### **Wellness & Health (independence)**

- Physical and emotional wellness
- Adult recreational opportunities
- Wellness
- Independence
- Promoting independence, wellness

### **New Facility**

- Library
- Full serve restaurant 5-6 days a week
- A coffee shop like Starbucks
- Contemplative quiet time room

### **Community**

- Social sense of family
- Inclusive and supportive
- Warmly greeted
- Add different ages to interact

### **Awareness: marketing, branding, & sales**

- Visibility
- Social media – get together
- Words we use and words they use

### **Accessibility**

- Transportation for docs (Dr. appointments?),
- Expanded hours

### **Needs Analysis (issues and challenges)**

- **Age/demographic issues**
- **Needs of the community**
- **Organizational improvement**
- **Awareness**
- **Services, products and programs**
- **Facilities issues**
- **Issues in community that will impact LOACC**

**Age/demographic issues**

- Chasm between younger and older
- Anticipate growth in Boomer population
- Dawn from P&R wanted to lower the minimum age to 40+ and to make the newsletter attractive to younger people.
- Would that increase membership or usage significantly?
- Would the mix of products & services have to be changed to make LOACC relevant to a younger membership?

**Needs of the community**

- What are needs of aging community – cognitive decline
- Are needs changing? If so how? (e.g. medical care)
- What would you like to see ACC do that it is not doing now?
- Meet changing needs of the LO adult community

**Organizational improvement**

- What can the ACC do to improve?
- Revenue needs
- Decrease dependence on m...? Funding
- Need new strategic plan – short time horizon

**Awareness**

- Social networking, fraternity, sense of community
- Image-branding
- Is communication of existence, products & services (that is, marketing & sales) effective? What is the value proposition from user's perspective?

**Services, products and programs**

- Are the products & services a problem? What makes members want to come to LOACC? Why do people become members? Why do people not become members? Is it the stigma of being an "old folks" place? What products are not up to par? What services are missing or not up to par?
- Are meals on wheels counted as use? Why is LOACC providing meals on wheels? Is that "mission-critical?"
- Better services, quality (target market)

**Facilities issues**

- The stairs are an obstacle, the elevator is not obvious, the rooms are small, and generally, the space is chopped up and doesn't flow. Is any renovation practical with public and/or private money? The parking lot is too dark for seniors to use at night. The primary things that inform the daily life of a senior citizen are safety and security. How does LOACC accomplish that with onsite services?

**Issues in community that will impact LOACC**

- PCC classes too expensive

**Who we serve (mission)**

- Adults 50 and over in the LO community
- HS volunteers
- Kids sometimes
- All adults 18 and older
- Don't advertise 50+, we are really limiting ourselves.
- Is the demographic (50+) a problem? Why are the majority of users so very old? What attracts them? Does that repulse a potential younger user group? Do you care? Can LOACC be more fun to attract a younger crowd? Would a younger membership create a more sustainable operation? Would you have to change the mix of activities to appeal to a younger membership?

### **Values?**

- Celebrate
- Inspire
- Wellness
- Trustworthy
- Competitive
- Reliable
- Honest
- Communication and understanding
- Adventure – Discovery, Growth, Dynamic, Celebration, Inspiration
- Inspiring connectivity
- Community interaction
- Participation
- Purpose
- Contribution
- Vital to our humanity and human experience
- Compassion
- Meeting ourselves through each other
- Fun,
- Wellness,
- Inspiration,
- Safety,
- Security.
- It has created a culture that embodies succinct truthful heartfelt conversations to fulfill unique personal identities and interest

### **Actions we might take**

- Mandatory membership
- Recruit members

### **Questions to ask and discuss**

- Who to serve and how to serve them?
- How people can feel like they are contributing?
- How people can interact?

- Who are LOACC's members or users right now?
- How have they changed over time and what does this mean for the future?
- How have your current programs impacted membership (e.g. How has meals on wheels impacted membership? What about other programs in the organization and outside of it?)
- Does LOACC want to change that mix or merely to expand the users in all age groups?
- What are the products and services provided by LOACC right now?
- Which of them give the members the most value (pleasure, information, etc.)?
- Is location (place) a problem? Any alternatives? What about satellite facilities?
- Is the "venue" (that is, the facilities) a problem?
- Should LOACC expand into virtual space? Would seniors connect & engage in online?

My response to the email sent in:

- Mission, vision, values. This is just standard rubric for consultants. There are way too many buzzwords that inhibit critical thinking.
- My response to this: This was the same guy that expressed his disagreement with our approach in the meeting. He is correct, mission, vision, and values are standard rubric (which means established custom, titles, headings, and categories)...for strategic planning. They help us identify, discuss, and develop key elements that help the organization understand why it exists, who it serves, what it does for them, how they will behave, and what future they are aiming for. I am sad that he makes these elements sound like a negative. They are simply structures we use to better understand what we are doing and to focus our conversations.
- The contribution of time to the project by the members and users should be valued and not just given lip service. Public participation is critical if LOACC is to be relevant to the community.
- We are engaging public participation, so this is a good comment, and I can only imagine this person is concerned about "lip service" because they have encountered a lot of community, government, and organizational processes that bring people together just to bring people together so the legal mandate can be met (you must check the box to move forward). This is obviously not the case in this situation. I am very happy we have the opportunity to engage the community and most certainly value their time.
- The rest of this email generates a number of questions that we can discuss, if they are relevant to the work we are currently doing (many of them are great strategic questions, but they are out of the scope of what we are currently doing).
- I've sorted the comments and pulled out the questions I think are relevant:

#### **Comment of interest**

Should LOACC be merely a social club or cheap county club for seniors? Resounding "no" to the last question. Should it be a place—like a country club—where business development activities occur? Again, a resounding "no."

### **PUBLIC OUTREACH MEETING (DOUG FREEMAN) OCT. 14, 2015**

#### **Background:**

- It's been six years since a staff-only developed vision, mission and values statement was developed. No updates have occurred since then.

#### **Questions at meeting kickoff:**

- Does the LOACC need to make money from programs?
  - Must recover 125% of fees; apply for grants for new initiatives/programs but that funding is not for sustainability.
- What are the demographics of LOACC users?
  - Specifics are unknown, but approx. 25% are 50+ and that percent may be increasing.
- Has the LOACC always been a department of LO P&R?
  - Yes.
- Is a process for strategic planning in place?
  - Yes; last plan was developed 3 years ago.
- What is the current membership and any trends?
  - Membership is steady at about 1,300 but there are approx. 4,000 local users, volunteers and staff.
- What is the history of classes at LOACC?
  - In the past, there were many more “serious” classes such as those provided by PCC but the funding model was not sustainable; currently, there are more “recreational” type classes.

**Observations and notes from table groups:**

- Is this an “adult” center or a “senior center?”
  - How should these terms be defined?
- An assumption is that users are retired, but that’s not really the case.
- What would be the value of more inclusion as far as age range for users is concerned?
  - Represent the community better and allow intergenerational experiences.
- What’s the value of membership when you have nearly 3,000 non-members using the facility/programs and even members must pay for each activity/program?
  - Many don’t know how those funds are used.
- Issues regarding aging are very important but are they being addressed adequately in programs and services?
- Could mobility of current/potential users be address better?
  - A growing number of folks are driving less but would like to be active through the LOACC.
- Key words/phrases overheard:
  - LOACC must stress adaptability
  - Need to be in touch with the community
  - Respect is critical
  - Create/support a culture

- Responsive
- Nurture a multi-generational “family”
- Participate
- Build relationships
- Aging issues
- Younger generations are not joiners, so will adult centers become obsolete or change dramatically in function?
- Better communication between the LOACC and community
- Support for single seniors
- Challenges with change and addressing it
- Innovative ways to reach out to citizens
- All communications state “50+” so is that true or even the right approach?
- Inadequate follow-up by staff to people on wait lists for programs/activities
- Must focus services
- Maybe need a “one stop shopping” lead to contact for questions/needs regarding resources
- Need for individual counseling, especially on aging and care issues
- Creative approaches
- Visit the LOACC just to be around other people vs. attending events or participating in programs
- Volunteer opportunities through the Center
- Adult enrichment
- Programs/activities involving kids for exposure to older adults and leveraging their energy
- Increase visibility of the LOACC in the community; market it better
- Serve as a connector for people, community aspects and city departments
- What are other adult centers doing?
- Liaison to county and state contacts and programs
- Participation trends for various programs/services?

### **FUTURE VISION WORKSHEET – OCT. 16, 2014**

Work Session: Mission

A mission describes whom the organization serves and what they do for them.

Current Mission: The LOACC is a community focal point that celebrates aging through creative, inspiring and exciting opportunities that promote independence, as well as physical and emotional wellness.

**Whom should the LOACC serve?**

People 50+

Adults

Entire Adult Community

Adults 50 and over in the L.O. Community

The Community no age limits

Primarily 50+ with inclusion of all age groups in specific events

A gathering place for the 50+ community that fosters independence and strengthens physical and emotional well-being.

Adults – 40 to 50 (fifty is the new 40!)

Seniors – at least 50+ for anyone who wants to come

**What should the LOACC provide for them (products, services, experiences, outcomes, etc.)? ...and why?**

1.

- a. Learning opportunities and support groups for health issues
- b. Social (recreational) activities to engage in social interaction
- c. Human Services – wellness and interdependence – connect to resources
- d. Recreational opportunities
- e. Human service for support
- f. A safe warm space for events
- g. Programs that deal with aging in a positive way
- h. Community – sense of place, welcoming, hospitable
- i. Social engagement/Sense of Community

2.

- a. A sense of being part of the community
- b. Wellness (support group) activities; fitness, health, wellness to maintain independence
- c. Academic classes – high culture (i.e. museums)
- d. Lifelong learning/adult classes
- e. Recreational activities for social interaction
- f. Opportunities to learn and contribute
- g. Broader fitness facility (to attract the newly retired)
- h. Academic classes, increased cultural opportunities
- i. Learning Opportunities/Support Groups for health related issues

3.

- a. Social engagement
- b. Expansion of activities into the evening to fit various lifestyles
- c. Social needs of all adults – outreach to the community
- d. Fitness, health and wellness – nurturing a sense of community
- e. Continuing education/wellness/independence
- f. Structure and person to coordinate storytelling night, open mic –song, poem etc..
- g. Cultural (arts, wine, walk, culinary, fashion) – One day events- Travel programs (international)

- h. Partner with community group (i.e. AA or single parents etc...)
- i. Mental and physical wellness and good food

#### Work Session: Vision Statement & Goals

A vision statement describes the ideal future state as if it already exists, in present tense. Visionary goals are what must be created to make the vision real.

Current Vision Statement: The Center provides a dynamic, friendly and indispensable venue for the community.

#### **How might you change the current vision statement (add to it, take away from it, etc.)?**

Center provides welcoming and up beat presence to all coming into the center and provide high quality services.

Words: on-going basis, accommodating, respectful, ever-changing, holistic, nurturing

Provide opportunities for adults to connect to the greater community. (We would like to add- That all LO residents are aware of the benefits/services of the LOACC.

Nothing written down

Take away dynamic and indispensable – The ACC provides a place to connect in celebrating our lives in our community together.

Provide opportunity for contribution, a welcome meeting place.

Intergenerational, Physically welcoming building that is all encompassing (kitchen, art studies, exercise)

Fun, staffed, child cave in space available, coffee shop. Note: When one adds a number 50+ it limits.

Welcoming, open, upbeat, good food, non-judgmental, receptive, positive attitudes, customer service, lots of people, more energy of staff

#### **What would you like to see in place at LOACC in 5-10 years?**

1.

- a. Nothing written down
- b. Intergenerational activities, experiences
- c. Intergenerational adults
- d. Improve image and branding that stresses the full range of dynamic activities and opportunities.
- e. Celebrating life
- f. The human experience, a place to contribute to each other's lives
- g. New facilities (may be part of a larger community center)
- h. Culture of deep respect and positive engagement with each other (+ various ages)
- i. A new director with more vision

2.

- a. Nothing written down
- b. Speakers/learning experiences
- c. Hustle and bustle with discussions and laughter
- d. Promote volunteer opportunities to support ACC.
- e. Pool, more social opportunities, more relevant, travel
- f. Nothing written down
- g. Broader reach of programs (intergenerational) that can still cater to seniors (i.e. headsets for a cooking class that be checked out)
- h. increased visibility
- i. More usage

3.

- a. Nothing written down
- b. Maintaining current activities – expansion for new trends issues
- c. Time flies with comradery and laughter
- d. Poker nights
- e. Together as a community
- f. Nothing written down
- g. Nothing written down
- h. Re-brand (i.e. “community center”
- i. Implement new (or repurposed) ideas

4.

- a. Nothing written down
- b. Events that bring in the community as a whole.
- c. Adult center volunteer groups out in the community. Not a central location but spread out through the community.
- d. Nothing written down
- e. A place to connect
- f. Nothing written down
- g. Nothing written down
- h. Expanded hours – evening and Sat. to accommodate families
- 1. Better use of volunteers

5. No one saw #5 on the back page, so it was left blank by all.

Work Session: Values

An organization’s values are the principles and standards they hold.

Values guide behavior, decision-making, and action.

Current values:

Integrity  
 Honesty  
 Caring  
 Compassion  
 Accountability  
 Adventure  
 Cleanliness

**What are the top 3 values LOACC should hold?**

1.

- a. Relationships, Promotion, Positive!
- b. Accountability
- c. Caring and compassion.
- d. Meet the needs of the adult community
- e. Inclusion
- f. Compassion
- g. Nothing written down
- h. Wellness

## i. Customer service

Behavior or Action that would demonstrate this value:

“Hello” to everyone walking into the building, active outreach to elders, customer service.

Transparent reporting of activities, finances, actions etc.. and being open to answering questions from various publics (open-door policy)

Open doors to all adults, human services

Nothing written down

Inclusion, open the center to the community

Nothing written down

Nothing written down

Nothing written down

Welcome all who come, greet with a smile

## 2.

a. Better use of volunteers run at the front desk

b. Caring

c. Relevant

d. Provide community environment

e. Compassion

f. Accountability

g. Inclusive

h. Fun

i. Safe place

Behavior or Action that would demonstrate this value:

Nothing written down

Having programs that mirror the needs of the community and providing a compassionate, friendly, inviting environment

Moving forwards while keep our connection to the past.

Nothing written down

Compassion, human services

Nothing written down

Facility to serve all, Input from all recipients, safe, all decades 50-100+, physically accessible

Parties

Open, non-judgmental, communicate, share information

## 3.

a. Nothing written down

b. Cleanliness

c. Good Stewards of the community's resources and people

d. Improve health and wellness

e. Inspiration

f. Adventure

g. Genuine connections

h. Trustworthy

i. Good effective communication

Behavior or Action that would demonstrate this value:

Nothing written down

Maintaining a clean, healthy environment that is safe for individuals with compromised immune systems. Having cleaning products (hand wipes, hand sanitizer) readily available (already in place)

Quality human services, fiscally responsible. For example, Ryan is in charge of natural areas and he has to be a good steward which means he protects the natural areas, provides a place for people to connect with nature, education, and cost, he takes it all into account.

Provide excellence and quality in all services rendered in the community

Inspiring the community through activities

Discovery, growth, participation, dynamic, celebration, inspiration, purpose, contribution

Intergenerational, listen to recipient needs

Nothing written down

Between staff of all levels, verbally and in print

### **What Else?**

Please write anything else you wish LOACC to consider as we develop the vision of our future:

Continue to ask the questions.

Nothing written down

Nothing written down

Nothing written down

Leadership of the center, the current leadership drives the center in a positive direction.

Nothing written down

Thank you for opening this up to the public. We would like the opportunity to have a follow up meeting got review and discuss before finalizing. Survey broader community. Hasn't been done in 10+ years.

Things change.

Research options for grandparent's ability to participate in classes and/or interact with others at the center, i.e. 2 hours of free childcare. Consider that the space, set up of building is inhibiting use of ACC?

Nothing written down

## **COMMUNITY MEETING NOTES – OCT. 14, 2014**

Hello LOACC team,

First of all, thank you all for your work in helping make this community engagement event happen. It came together very nicely and I think we got some good information from it. You are all a pleasure to work with.

The following document is meant to inform our continued conversations as we develop draft mission statement, vision statement, values, and goals for LOACC.

This document contains:

1. The contents from the community engagement worksheets, clustered in thematic groups.
2. The contents of the community engagement notes, clustered in thematic groups.

3. Consultant comments and some development work (to start the conversation, not as final versions of anything)

The content has been clustered and organized by Shane to help make sense of all the information. There are many ways to interpret this information and your unique perspective is important, so if you don't agree that's great. Please bring your perspectives to our conversations or write them up and get them to us (shane@taofm.com).

Please review this document and use the information to do a couple things:

1. Generate questions –
  - a. What more do you want to know?
  - b. What questions does the center need to answer to move forward in an informed manner?
2. Develop drafts of the mission, vision, values, and goals.

We look forward to our continued work with you.

Sincerely, Shane & Doug  
Forward Motion Facilitation

### Summary of information

The following lists show an interpretation of the information generated at the meeting. For more detail go further into the document.

#### Mission Overview:

##### *Who should we serve?*

Answer ranged from everyone to only 50+

The general feel seems to be to focus on adults while simultaneously keeping the center open to any and all who wish to be involved.

##### *What should we provide?*

Worksheet Clustered Topics (# = number of ideas that support the cluster)

- Learning, culture and personal growth (7)
- Social Opportunities & Events – Community (7)
- Health, Fitness, Wellness & Aging (5)
- Opportunities to contribute (3)
- Support groups (3)
- Services (2)
- Recreation (2)

#### Vision Overview:

I took all the comments about how to change the current vision and synthesized them into a single statement. This statement captures everything possible. It needs to be highly edited. In addition I generated a second statement from the participants notes.

*Synthesized Vision Ideas from worksheet (draft in need of development & editing)*

The LOACC is an all encompassing, fun, dynamic, indispensable, friendly, open, welcoming meeting place and building where we connect to celebrate our lives and contribute to our community together, with lots of people. It has holistic high quality services and an up beat, non-judgmental, energetic, receptive, respectful, accommodating, nurturing staff with positive attitudes, who provide great customer service. We provide on-going and ever-changing opportunities for adults to connect to the intergenerational LO community through the staff, childcare, good food, and the coffee shop.

*Synthesized Vision Ideas from participants notes*

LOACC is a fun place to gather with friends, a focal point where we celebrate aging, promote independence, and contribute to our community to enrich our body and soul. It is filled with vital humanity and a variety of programs and activities that produce results, are inspiring, energetic, warm, and meet the needs of the Adult community in LO. All LO residents are aware of the benefits and services of the LOACC.

**Goals overview**

These are lists of the things that members/participants either want to continue doing or would like to see in the future.

In answer to the question, “What would you like to see at LOACC in 5-10 years?” participants provided specific and broad ideas. The ideas clustered into these possible categories:

- Social: Celebration of life – Community contribution (7)
- Culture/Climate in the org (4)
- Volunteer opportunities (4)
- Intergenerational (3)
- Branding (3)
- Direction & Vision (3)
- Learning & growth opportunities (3)
- New Facilities (2)
- Expanded hours (2)
- Maintain the status quo (1)

From the participants notes I generated these clusters to show what members might want. These are very similar to what the center might provide (mission related).

- Education & learning
- Qualities of opportunities
- Wellness & Health (independence)
- New Facility
- Community
- Awareness: marketing, branding, & sales
- Accessibility

**Values**

Again, be very critical of what I present here. These are themes that came from my clustering of the participants' ideas. You may come up with a very different set of values from what they proposed. Review the richer material later in this document.

- Human Connection
- Altruism & Stewardship
- Provide for Community
- Accountability
- Positivity
- Living Well

### **Mission Related Information**

A mission describes whom the organization serves and what they do for them.

**Current Mission:** The LOACC is a community focal point that celebrates aging through creative, inspiring and exciting opportunities that promote independence, as well as physical and emotional wellness.

### *Worksheet notes*

*Whom should the LOACC serve?*

10. A gathering place for the 50+ community that fosters independence and strengthens physical and emotional well-being.
11. People 50+
12. Seniors – at least 50+ for anyone who wants to come
13. Adults 50 and over in the L.O. Community
14. Adults – 40 to 50 (fifty is the new 40!)
15. Primarily 50+ with inclusion of all age groups in specific events
16. Adults
17. Entire Adult Community
18. The Community no age limits

### *Participant notes*

**Who we serve (mission)**

- Adults 50 and over in the LO community
- HS volunteers
- Kids sometimes
- All adults 18 and older
- Don't advertise 50+, we are really limiting ourselves.
- Is the demographic (50+) a problem? Why are the majority of users so very old? What attracts them? Does that repulse a potential younger user group? Do you care? Can LOACC be more fun to attract a younger crowd? Would a younger membership create a more sustainable operation? Would you have to change the mix of activities to appeal to a younger membership?

### *Worksheet notes*

*What should the LOACC provide for them (products, services, experiences, outcomes, etc.)? ...and why?*

**Clustered Topics (# = number of support ideas)**

- Learning, culture and personal growth (7)
- Social Opportunities & Events – Community (7)
- Health, Fitness, Wellness & Aging (5)
- Opportunities to contribute (3)
- Support groups (3)
- Services (2)
- Recreation (2)

**Cluster groups data:**

Learning, culture and personal growth (7)

- Academic classes – high culture (i.e. museums)
- Lifelong learning/adult classes
- Learning opportunities
- Academic classes, increased cultural opportunities
- Continuing education
- Cultural (arts, wine, walk, culinary, fashion) – One day events- Travel programs (international)
- Learning Opportunities

Social Opportunities & Events – Community (7)

- Structure and person to coordinate storytelling night, open mic –song, poem etc..
- A safe warm space for events
- Community – sense of place, welcoming, hospitable
- Social engagement/Sense of Community
- A sense of being part of the community
- Social engagement
- Social (recreational) activities to engage in social interaction

Health, Fitness, Wellness & Aging (5)

- Broader fitness facility (to attract the newly retired)
- Fitness, health and wellness – nurturing a sense of community
- Wellness/independence
- Mental and physical wellness and good food
- Programs that deal with aging in a positive way

Opportunities to contribute (3)

- Opportunities to learn and contribute
- Social needs of all adults – outreach to the community
- Partner with community group (i.e. AA or single parents etc...)

Support groups (3)

- Wellness (support group) activities; fitness, health, wellness to maintain independence
- Support Groups for health related issues
- Support groups for health issues

Services (2)

- Human Services – wellness and interdependence – connect to resources
- Human service for support

Recreation (2)

- Recreational opportunities
- Recreational activities for social interaction

### Vision Statement Related Notes

A vision statement describes the ideal future state as if it already exists, in present tense. Visionary goals are what must be created to make the vision real.

#### Worksheet notes

**Current Vision Statement:** The Center provides a dynamic, friendly and indispensable venue for the community.

*How might you change the current vision statement (add to it, take away from it, etc.)?*

#### DRAFT VISION STATEMENT

The LOACC is an all encompassing, fun, dynamic, indispensable, friendly, open, welcoming meeting place and building where we connect to celebrate our lives and contribute to our community together, with lots of people. It has holistic high quality services and an up beat, non-judgmental, energetic, receptive, respectful, accommodating, nurturing staff with positive attitudes, who provide great customer service. We provide on-going and ever-changing opportunities for adults to connect to the intergenerational LO community through the staff, child-care, good food, and the coffee shop.

9. Center provides welcoming and up beat presence to all coming into the center and provide high quality services.
10. Words: on-going basis, accommodating, respectful, ever-changing, holistic, nurturing
11. Provide opportunities for adults to connect to the greater community. (We would like to add- That all LO residents are aware of the benefits/services of the LOACC.
12. Take away dynamic and indispensable – The ACC provides a place to connect in celebrating our lives in our community together.
13. Provide opportunity for contribution, a welcome meeting place.
14. Intergenerational, Physically welcoming building that is all encompassing (kitchen, art studies, exercise)
15. Fun, staffed, child care in space available, coffee shop. Note: When one adds a number 50+ it limits.
16. Welcoming, open, upbeat, good food, non-judgmental, receptive, positive attitudes, customer service, lots of people, more energy of staff

#### Participant notes

##### We are (vision) – what we can be in the future

LOACC is a fun place to gather with friends, a focal point where we celebrate aging, promote independence, and contribute to our community to enrich our body and soul. It is filled with vital humanity and a variety of programs and activities that produce results, are inspiring, energetic, warm, and meet the needs of the Adult community in LO. All LO residents are aware of the benefits and services of the LOACC.

- Community focal point
- Celebrates ageing
- Promote independence
- Vital to our humanity that who we are is a contributor
- HS students
- Vital to our humanity

- Inspiring
- A busy energetic group- all involved in various activities. Warm and people are energized
- All Lo residents are aware of the benefits and services of the LOACC
- To meet the needs of the Adult Community in Lake Oswego
- To provide a variety of programs to the Adult Community
- To produce results (in particular with Fitness) but this can be with all classes
- A fun place to gather with friends to enrich your body and soul

### Goal Related Notes

These notes relate to what you might provide in the future (and may already provide) that center members would like to see.

### Worksheet notes

*What would you like to see in place at LOACC in 5-10 years?*

### CLUSTERS

- Social: Celebration of life – Community contribution (7)
- Culture/Climate in the org (4)
- Volunteer opportunities (4)
- Intergenerational (3)
- Branding (3)
- Direction & Vision (3)
- Learning & growth opportunities (3)
- New Facilities (2)
- Expanded hours (2)
- Maintain the status quo (1)

### CLUSTER DATA

Social: Celebration of life – Community contribution (7)

- A place to connect
- Poker nights
- More social opportunities
- Together as a community
- Celebrating life
- The human experience, a place to contribute to each other's lives
- Events that bring in the community as a whole.

Culture/Climate in the org (4)

- Hustle and bustle with discussions and laughter
- Time flies with comradery and laughter
- More usage
- Culture of deep respect and positive engagement with each other (+ various ages)

Volunteer opportunities (4)

- Better use of volunteers run at the front desk
- Better use of volunteers
- Promote volunteer opportunities to support ACC.

- Adult center volunteer groups out in the community. Not a central location but spread out through the community.

#### Intergenerational (3)

- Intergenerational activities, experiences
- Broader reach of programs (intergenerational) that can still cater to seniors (i.e. headsets for a cooking class that be checked out)
- Intergenerational adults

#### Branding (3)

- Re-brand (i.e. “community center”)
- Increased visibility
- Improve image and branding that stresses the full range of dynamic activities and opportunities.

#### Direction & Vision (3)

- More relevant
- A new director with more vision
- Implement new (or repurposed) ideas

#### Learning & growth opportunities (3)

- Expansion for new trends issues
- Travel
- Speakers/learning experiences

#### New Facilities (2)

- Pool
- New facilities (may be part of a larger community center)

#### Expanded hours (2)

- Expanded hours – evening and Sat. to accommodate families
- Expansion of activities into the evening to fit various lifestyles

#### Maintain the status quo (1)

- Maintaining current activities –

#### *Participant notes*

These notes can be used for both mission (what we do) and goals for the future. This is what participants want to see at the center, which easily can translate into goals.

#### **We provide... what participants would like to see**

- Education & learning
- Qualities of opportunities
- Wellness & Health (independence)
- New Facility
- Community
- Awareness: marketing, branding, & sales
- Accessibility

#### **Education & learning**

- Formal classes about serious matters (co-learning sessions or traditional pedagogy)
- Used to have more classes, education – retired professors
- Adult Ed, more needed

- Lifelong learning
- Adult education
- Arts, Crafts
- Storytelling
- Life-long learning
- Knitting
- Card playing
- Cooking classes
- People sharing their skills and knowledge
- Tutoring
- Computer classes
- Square dancing
- Brain activity
- Story telling night
- Open mic night
- Stir it up night
- Contests
- Knitting
- Can we get some seniors to do a corn hole tournament with HS students? Seniors v. Seniors
- Perfect Pairing: Young People Teaching Seniors About Technology
- Free grandchild care for an hour or two
- Olive said we need more philosophical classes
- Board games-Pictionary, Outburst

#### **Qualities of opportunities**

- Creative, inspiring, exciting opportunities
- How do I keep growing?
- Inspiring and exciting opportunities
- Celebrate ageing
- Creative, inspiring opportunities
- Opportunities to grow
- Inviting, welcoming

#### **Wellness & Health (independence)**

- Physical and emotional wellness
- Adult recreational opportunities
- Wellness
- Independence
- Promoting independence, wellness

#### **New Facility**

- Library
- Full serve restaurant 5-6 days a week
- A coffee shop like Starbucks

- Contemplative quiet time room

### **Community**

- Social sense of family
- Inclusive and supportive
- Warmly greeted
- Add different ages to interact

### **Awareness: marketing, branding, & sales**

- Visibility
- Social media – get together
- Words we use and words they use

### **Accessibility**

- Transportation for docs (Dr. appointments?),
- Expanded hours

### **Values related notes**

An organization's values are the principles and standards they hold. Values guide behavior, decision-making, and action.

It often is easier to understand values by inserting value words and action statements into this sentence

**We believe in...(insert value word here)...and to prove it we...(insert action here).**

### *Worksheet notes*

Current values

- Integrity
- Honesty
- Caring
- Compassion
- Accountability
- Adventure
- Cleanliness

### **What are the top 3 values LOACC should hold?**

#### **Clusters**

- Human Connection
- Altruism & Stewardship
- Provide for Community
- Accountability
- Positivity
- Living Well

#### **Human Connection**

- Relationships,
  - Active outreach to elders, customer service.
- c. Caring and compassion.
  - b. Open doors to all adults, human services
- e. Inclusion
  - b. Inclusion, open the center to the community
- g. Inclusive
  - d. Facility to serve all, Input from all recipients, safe, all decades 50-100+, physically accessible
- e. Inspiration
  - e. Inspiring the community through activities
- g. Genuine connections
  - f. Intergenerational, listen to recipient need

### **Altruism & Stewardship**

- e. Compassion
  - b. Compassion, human services
- f. Compassion
- b. Caring
  - b. Having programs that mirror the needs of the community and providing a compassionate, friendly, inviting environment
- i. Safe place
  - c. Open, non-judgmental, communicate, share information
- c. Good Stewards of the community's resources and people
  - b. Quality human services, fiscally responsible. For example, Ryan is in charge of natural areas and he has to be a good steward which means he protects the natural areas, provides a place for people to connect with nature, education, and cost, he takes it all into account.

### **Provide for Community**

- d. Meet the needs of the adult community
- c. Relevant
  - c. Moving forwards while keep our connection to the past.
- d. d. Provide community environment
- b. Cleanliness
  - b. Maintaining a clean, healthy environment that is safe for individuals with compromised immune systems. Having cleaning products (hand wipes, hand sanitizer) readily available (already in place)
- i. Good effective communication
  - b. Between staff of all levels, verbally and in print

### **Accountability**

- b. Accountability
  - d. Transparent reporting of activities, finances, actions etc.. and being open to answering questions from various publics (open-door policy)
- e. f. Accountability
- f. h. Trustworthy

### **Positivity**

Positive!

- b. "Hello" to everyone walking into the building,
- i. Customer service
  - b. Welcome all who come, greet with a smile

### **Living Well**

- h. Wellness
- h. Fun
  - d. Parties
  - d. Improve health and wellness
    - b. Provide excellence and quality in all services rendered in the community
- f. Adventure
  - b. Discovery, growth, participation, dynamic, celebration, inspiration, purpose, contribution

### *Participant notes*

#### **Values?**

- Celebrate
- Inspire
- Wellness
- Trustworthy
- Competitive
- Reliable
- Honest
- Communication and understanding
- Adventure – Discovery, Growth, Dynamic, Celebration, Inspiration
- Inspiring connectivity
- Community interaction
- Participation
- Purpose
- Contribution
- Vital to our humanity and human experience
- Compassion
- Meeting ourselves through each other
- Fun,
- Wellness,
- Inspiration,
- Safety,
- Security.
- It has created a culture that embodies succinct truthful heartfelt conversations to fulfill unique personal identities and interest

### **Other things**

Here are a few other notes, questions, and things that don't fit into our mission, vision, values, and goals rubric.

*Worksheet notes***Notes from worksheet**

- e. Continue to ask the questions.
- f. Leadership of the center, the current leadership drives the center in a positive direction.
- g. Thank you for opening this up to the public. We would like the opportunity to have a follow up meeting got review and discuss before finalizing. Survey broader community. Hasn't been done in 10+ years. Things change.
- h. Research options for grandparent's ability to participate in classes and/or interact with others at the center, i.e. 2 hours of free childcare. Consider that the space, set up of building is inhibiting use of ACC?

*Participant notes***Needs Analysis (issues and challenges)**

- Age/demographic issues
- Needs of the community
- Organizational improvement
- Awareness
- Services, products and programs
- Facilities issues
- Issues in community that will impact LOACC

**Age/demographic issues**

- Chasm between younger and older
- Anticipate growth in Boomer population
- Dawn from P&R wanted to lower the minimum age to 40+ and to make the newsletter attractive to younger people.
- Would that increase membership or usage significantly?
- Would the mix of products & services have to be changed to make LOACC relevant to a younger membership?

**Needs of the community**

- What are needs of aging community – cognitive decline
- Are needs changing? If so how? (e.g. medical care)
- What would you like to see ACC do that it is not doing now?
- Meet changing needs of the LO adult community

**Organizational improvement**

- What can the ACC do to improve?
- Revenue needs
- Decrease dependence on m...? Funding
- Need new strategic plan – short time horizon

**Awareness**

- Social networking, fraternity, sense of community
- Image-branding

- Is communication of existence, products & services (that is, marketing & sales) effective? What is the value proposition from user's perspective?

#### **Services, products and programs**

- Are the products & services a problem? What makes members want to come to LOACC? Why do people become members? Why do people not become members? Is it the stigma of being an "old folks" place? What products are not up to par? What services are missing or not up to par?
- Are meals on wheels counted as use? Why is LOACC providing meals on wheels? Is that "mission-critical?"
- Better services, quality (target market)

#### **Facilities issues**

- The stairs are an obstacle, the elevator is not obvious, the rooms are small, and generally, the space is chopped up and doesn't flow. Is any renovation practical with public and/or private money? The parking lot is too dark for seniors to use at night. The primary things that inform the daily life of a senior citizen are safety and security. How does LOACC accomplish that with onsite services?

#### **Issues in community that will impact LOACC**

- PCC classes too expensive

#### **Actions we might take**

- Mandatory membership
- Recruit members

#### **Questions to ask and discuss**

- Who to serve and how to serve them?
- How people can feel like they are contributing?
- How people can interact?
- Who are LOACC's members or users right now?
- How have they changed over time and what does this mean for the future?
- How have your current programs impacted membership (e.g. How has meals on wheels impacted membership? What about other programs in the organization and outside of it?)
- Does LOACC want to change that mix or merely to expand the users in all age groups?
- What are the products and services provided by LOACC right now?
- Which of them give the members the most value (pleasure, information, etc.)?
- Is location (place) a problem? Any alternatives? What about satellite facilities?
- Is the "venue" (that is, the facilities) a problem?
- Should LOACC expand into virtual space? Would seniors connect & engage in online?

My response to the email a participant sent in:

- Mission, vision, values. This is just standard rubric for consultants. There are way too many buzzwords that inhibit critical thinking.

- My response to this: I believe this is the same guy that expressed his disagreement with our approach in the meeting and accused me of “lip service”. He is correct in that mission, vision, and values are standard rubric (which means established custom, titles, headings, and categories)...for strategic planning. They help us identify, discuss, and develop key elements that guide the organization to understand why it exists, who it serves, what it does for them, how they will behave, and what future they are aiming for. I am sad that he makes these elements sound like a negative. They are simply structures we use to better understand what we are doing and to focus our conversations.
- The contribution of time to the project by the members and users should be valued and not just given lip service. Public participation is critical if LOACC is to be relevant to the community.
- We are engaging public participation, so this is a good comment, and I can only imagine this person is concerned about “lip service” because they have encountered a lot of community, government, and organizational processes that bring people together just to bring people together so the legal mandate can be met (you must check the box to move forward). This is obviously not the case in this situation. I am very happy we have the opportunity to engage the community and most certainly value their time.
- The rest of this email generates a number of questions that we can discuss, if they are relevant to the work we are currently doing (many of them are great strategic questions, but they are out of the scope of what we are currently doing).
- I’ve sorted the comments and pulled out the questions I think are relevant: They are listed above.

**Comment of interest**

Should LOACC be merely a social club or cheap county club for seniors? Resounding “no” to the last question. Should it be a place—like a country club—where business development activities occur? Again, a resounding

**LOACC COMMUNITY VISIONING MEETING PRESENTATION – OCT. 14, 2014**



WELCOME TO THE  
COMMUNITY  
ENGAGEMENT  
MEETING!

## Introductions

- Share
  - Your name
  - A story of a positive experience with a community center

One minute per person



Vision Statement (2008):

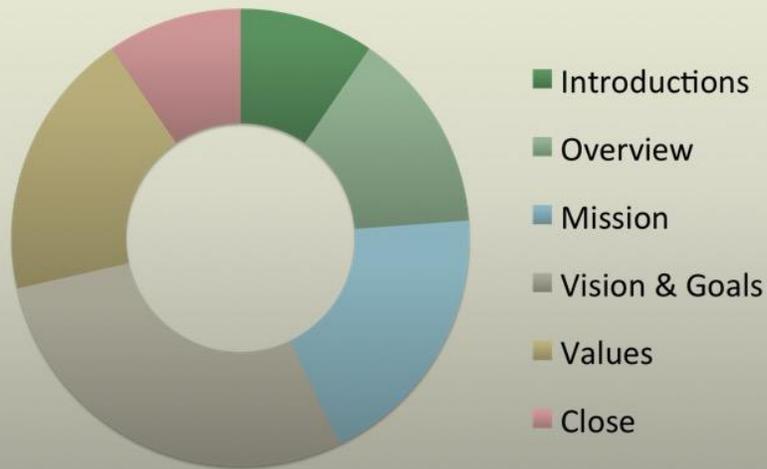
*“The Center provides a dynamic, friendly and indispensable venue for the community.”*

## How do you see the ACC future?



- What changes should be made to the current mission to make it meaningful in the future?
- What value (services, experiences, outcomes, products, etc.) should the ACC offer?

## Agenda



## Mission Statement

*The LOACC is a community focal point that celebrates aging through creative, inspiring and exciting opportunities that promote independence, as well as physical and emotional wellness.*



The ACC is soon to be 45 years old. In 1975, “people couldn’t wait to turn 50 to join!” How have things changed since then?

The Adult Community Center is a division of the City's Parks and Recreation Department.

P&R MISSION:

Lake Oswego Parks & Recreation provides excellence in building community, enriching lives, and caring for the urban and natural environment.



## Mission Conversation

Whom do you serve?  
What do you provide for them?



- Provide the world's best communications solutions that enable businesses to excel.
- To help all people live healthy lives.
- The Literacy Council is dedicated to helping adults learn to read, write, and speak English in order to improve their quality of life and ability to participate in the community.

## Context for the ACC

- A division of the Parks and Recreation Department
- The Parks and Recreation Department is one of the City's largest and most diverse Departments
- How does the ACC fit into the overall mission of the Department?



## Mission Conversation

Whom do you serve?  
What do you provide for them?



- Provide the world's best communications solutions that enable businesses to excel.
- To help all people live healthy lives.
- The Literacy Council is dedicated to helping adults learn to read, write, and speak English in order to improve their quality of life and ability to participate in the community.

## Mission Conversation

Whom do you serve?  
What do you provide for them?



- Provide the world's best communications solutions that enable businesses to excel.
- To help all people live healthy lives.
- The Literacy Council is dedicated to helping adults learn to read, write, and speak English in order to improve their quality of life and ability to participate in the community.

## Mission Statement

*The LOACC is a community focal point that celebrates aging through creative, inspiring and exciting opportunities that promote independence, as well as physical and emotional wellness.*



## Mission Worksheet

- *Whom should the LOACC serve?*
- *What should the LOACC provide for them?*
- *...and why?*



## Vision

- The ideal future state.
- *“The Center provides a dynamic, friendly and indispensable venue for the community.”*



## Mission Statement

*The LOACC is a community focal point that celebrates aging through creative, inspiring and exciting opportunities that promote independence, as well as physical and emotional wellness.*



## Vision

- The ideal future state.
- Vision exercise.
- *You are a journalist 5 years in the future. What do you experience (see, smell, do, learn, see others doing etc.) on your tour?*



## Vision Conversation

- Share the best part of your future vision.
- *Answer the two vision questions in your table group.*



## Values Conversation

- Why should an organization have specific “values?”
- How are they useful?
- *What are the top 3 values LOACC should hold?*
  - *For each value, identify 1 or 2 actions LOACC can take to show it.*

## What Else?

- Please capture any other thoughts you would like to share with the vision development team.



## Next Steps & Close

- We will take what you have shared and craft a:
  - Mission statement
  - Vision statement
  - Goals for LOACC
  - Values set
- Then seek feedback from the community with a survey.



## Vision Conversation

- Share the best part of your future vision.
- *Answer the two vision questions in your table group.*



### LOACC COMMUNITY VISIONING MEETING – OCT. 2, 2014

**Who:** Lake Oswego Adult Community Center

**What:** Community Visioning Meeting

**When:** October 14<sup>th</sup>, 2014 6:00-8:00

**Why:** To inform the development of the vision, mission, values, and goals of the center

**How:** Facilitated meeting with ~? People

**Rational Aim:**

Deepen the community's understanding of the history, context and purpose of the LOACC. Generate input for the vision, mission, values, and goal development process.

**Experiential Aim:**

Have people leave feeling good about possibilities and even contemplating how they or their organizations might be active with the LOACC.

**Focus Question:**

What vision of the future might we aspire to for the LOACC?

**Objectives:**

- Deepen understanding of the organization's history and current state
- Stimulate creativity and rich discussions leading to generating:
  - Clear mission elements
    - Whom should/does the LOACC serve?
    - What does the LOACC do for them?

- What should the LOACC do for them?
- What does the LOACC need to do better and not do for them?
- Visionary ideas for LOACC
  - What might the LOACC look like if it accomplishes its mission?
  - What might be the impact if the LOACC fails in its mission?
- A set of core values and guiding principles
  - What values should the LOACC hold?
  - What behaviors or guidelines might they use to show these values in action?
- Inspire action by participants

**Pre-Summit:**

- Send out information for participants to consider
- Develop presentations
  - LOACC history, current state
  - Industry current state and interesting things going on
- Develop worksheets
- Confirm logistics
  - Projector, screen
  - Sign in/up sheets
  - Materials
  - Food and drink?
- Prep posters (if any are appropriate)
- Get the equipment list together

**Roles:**

- Ann: Introduction
- Shane: Facilitator
- Doug: Technical and facilitation support
- Volunteers and staff: Support

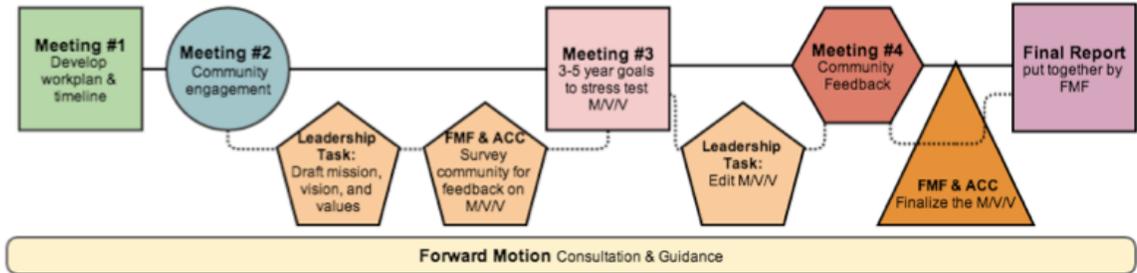
<b>Time</b>	<b>Min</b>	<b>Activity</b>
5:00	45	<b>Set up</b> Run the quote slides Play music Set up the tables and logistics (handouts and materials) Set up AV (projector, screen, music) Set up registration Posters
5:45	15	Mingle time/ Networking/ Registration
6:00	10	<b>Introduction and context setting</b>

		<ul style="list-style-type: none"> <li>• Welcome from Ann Adrian</li> <li>• Housekeeping, no formal breaks</li> <li>• Overview of why we are here</li> <li>• Goals: What information and ideas we hope to generate</li> <li>• Agenda (Mission, vision, values, goals)</li> </ul>
6:10	10	<p><b>Table introductions &amp; Stories</b></p> <ul style="list-style-type: none"> <li>• Name and Story sharing: a positive experience with a community center</li> <li>• Each person gets a minute</li> </ul>
6:20	15	<p><b>Background &amp; History</b></p> <ul style="list-style-type: none"> <li>• Share the history of the LOACC             <ul style="list-style-type: none"> <li>○ Possible share out of experiences at tables</li> </ul> </li> <li>• Share current state of industry and other interesting information that might inform the conversation</li> <li>• If there is time, give a few minutes for table discussions about materials people have read (aging report, current state of the industry, etc.)</li> <li>• Share the current mission, vision, &amp; values</li> </ul>
6:35	5	<p><b>General Process</b></p> <ul style="list-style-type: none"> <li>• Here are group guidelines (Take care of yourself, respect for time, ideas, and people; need everyone’s wisdom to do our best work)</li> <li>• We will present information, you work with the worksheets individually, then work at your table to create one final sheet</li> </ul>
6:40	20	<p><b>Work Session: Mission</b></p> <p>Presentation: What is a mission?              Currently we serve –</p> <ul style="list-style-type: none"> <li>• Explain what this might look like</li> <li>• Age demographic 20-30/30-40/40-50/50-60/60-70 etc.</li> </ul> <p>What we currently do –</p> <ul style="list-style-type: none"> <li>• Explain what this might look like</li> <li>• What are the different offerings they see and want depending on their stage in life?</li> </ul> <p>Work:</p> <ul style="list-style-type: none"> <li>• <i>Whom should the LOACC focus on serving? (10 min table discussion)</i></li> <li>• <i>What should the LOACC focus on providing or doing for them? (10 min)</i></li> <li>• <i>Why?</i></li> </ul> <p>At the end of each conversation, fill out the table worksheet.</p>

		Capture top three: who and what and why
7:00	30	<p><b>Work Session: Vision &amp; Goals</b>                  Presentation: What is a vision, current vision?</p> <p>Visualization: (10 min)                  Exercise: You are a journalist in the future – the executive director is showing you around the center. You heard it is the best center in the world and you have come to write an article that shares why it has the reputation. What do you see, smell, feel, hear, anticipate, and want to engage in? What are people doing? You see a schedule for the next year, what is on it?</p> <p>Open eyes, and write down the key points of your experience that you would like to see come into existence at the LOACC                  Imagine yourself in 5 years, etc.</p> <p>Share most significant things at your table                  Capture one from each person</p> <p>At your table answer the question:  <i>What would you like to see in place at LOACC in 5-10 years?</i></p> <ul style="list-style-type: none"> <li>- Pull ideas from your visioning</li> <li>- Consider what would inspire you, and that the center might aspire to</li> <li>- Consider what your children would tell you</li> <li>- Consider what your grandchildren would tell you</li> </ul> <p>Choose the top 5-10 and put on the worksheet (ranked as best you can)</p>
7:30	20	<p><b>Work Session: Values</b>                  Presentation: What is a value, current values?</p> <p>Discuss and decide on top five values</p> <p>Generate one guiding principle or action per value that the LOACC might take to show this value.  <i>How might LOACC show this value in action?</i></p>
7:50	10	<p><b>Review, next steps, and close</b></p> <p>Review what we have accomplished in the evening: Topics covered and information gathered                  Explain next steps on where the information will go and how it will be used – and how they can keep up with the progress                  Thank everyone for their time and thinking</p>

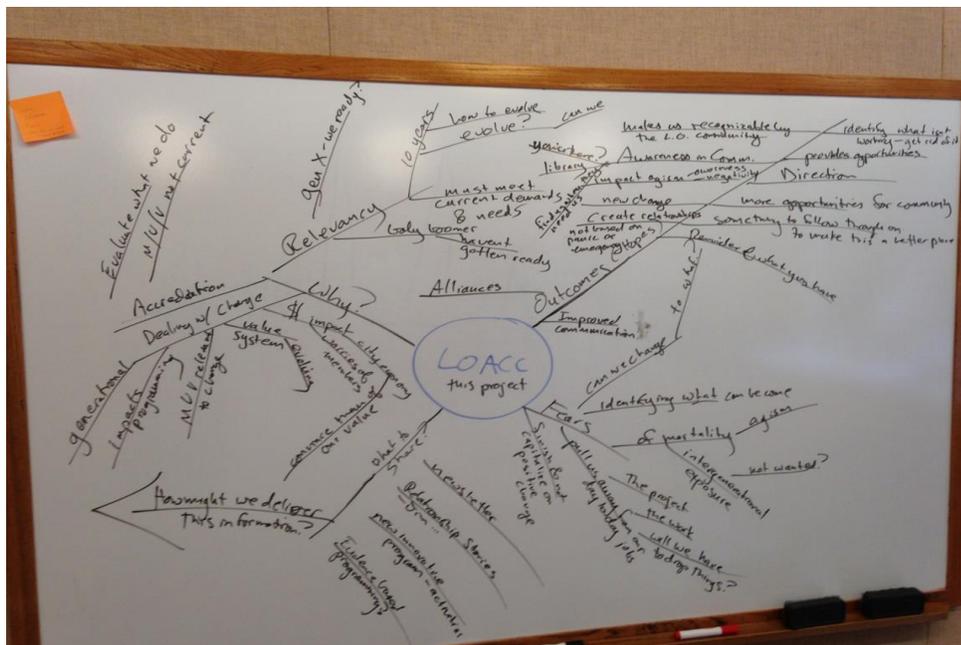
### LOACC WORKPLAN

LOACC - Work Plan & Timeline Map



Item	Meeting 1	Meeting 2	Draft MVV	Survey	Meeting 3	Edit MVV	Meeting 4	Finalize MVV	Final report
When	8/29/14	10/15/2014 6:30-8:30 p.m.	Data to you 10/22/14 Drafts by 10/31/14	Survey constructed by 11/7/14 Survey closes by 11/21/14	1 <sup>st</sup> week of December	Within 1 week of Meeting 3	1 <sup>st</sup> or 2 <sup>nd</sup> week of January	Within 1 week of meeting 4	2 weeks after M/V/V finalized
Where	LOACC	LOACC: Oak Room	LOACC	LOACC & the internet	LOACC: Room TBD	LOACC	LOACC	LOACC	NA
Who	Forward Motion & Key LOACC staff	The usual suspects + a broad scope of other opinions	Strategy team	FMF & LOACC staff	FMF, Strategy team	Strategy team	"Usual Suspects"? Staff, Volunteers???	Strategy team & leadership	FMF
Output	Work plan & timeline map	Data to inform Mission, Vision, Values & Goals	Draft Mission, Vision & Values	Feedback report on draft Mission, Vision, Values	5-7 Visionary & Practical Goals	Penultimate draft M/V/V	Feedback from community Status update Community satisfaction	Mission, Vision, and values statements	Final Report: Summary Data Recommendations
Report to	Ann	LOACC strategy team	Ann, strategy committee, and the survey participants	Forward Motion: Shane & Doug Ann	Ann	Forward Motion: Shane & Doug	Strategy Team	Forward Motion: Doug & Shane	Ann, LOACC, the Community
Notes		16 tables x 128 chairs		Survey Monkey No essay answers: too much processing					

### INITIAL ORGANIZATIONAL MEETING – AUG. 29, 2014



**Who:**

- Maria Bigelow
- Ann Adrian
- Gary
- Jim
- Berta
- Pam
- Ruth
- Doug
- Shane

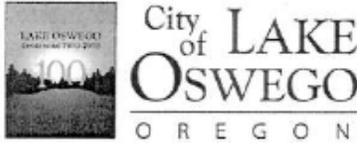
**Agenda: details**

- Intros (name, location, passion)
  - Shane; Strategy and innovation
  - Doug: Clarity
  - Ruth: doing the best work possible
  - Berta: serving adults & families to create supporting programs
  - Community service
  - Gary: building innovation and construction
  - Ann: Service excellence
  - Pam: Making ACC as good as it can be: tax payer efficiency
- What struck us about what we've seen so far (Doug and Shane)
- Communications Channel clarity (Shane & Ann are points of contact: Everyone receives all relevant emails until they indicate otherwise)
- Mind map to answer: Why? Outcomes (hopes)? Fears? What data to share?
- Overviewed the Lake Oswego Parks & Recreation mission statement; talked about structure of a good mission & process for an idea cascade to inform their own mission.
- Worked through the timeline/work plan

**Mind Map output**

- LOACC Strategy Project
  - Why are you doing it?
    - Dealing with change
      - Generational
      - Impacts programming
      - Mission, vision, values relevant to change
      - Value system
        - Is evolving
      - \$ impact
        - The worries of members
        - City economy
          - Convince them of our value
    - Accreditation
      - Evaluate what we do
      - Mission, vision, and values not current
    - Relevancy
      - We saw the baby boomers coming

- Haven't gotten ready
  - Generation X: are we ready for them?
  - 10 years
    - How do we evolve?
    - Can we evolve?
  - We must meet current demands and needs
- Outcomes (hopes)?
  - Improved communication
  - Reminder of what you have
  - Something to follow through on to make this a better place
  - More opportunities for community
  - Direction
  - Provides opportunities
  - Identify what isn't working – get rid of it
  - Makes us recognizable by the L.O. community
  - Awareness in community
    - People ask, "you're there?"
    - Like the library
    - People find us when they need us
  - Impact on ageism
    - Awareness
    - Negativity
  - New change
  - Create relationships not based on panic or emergency
- Fears?
  - Can we change
    - What do we change to?
  - Identifying what we can become
  - Of mortality
    - Ageism
    - Intergenerational exposure
      - Not wanted?
  - That we finish and don't capitalize on positive change
  - This work will pull us away from our day to day jobs
    - The project
    - The work
    - Will we have to drop things?
- What to share? [ with the participants to give them ideas about what a community center might become]
  - How might we deliver this information?
  - What we are currently interested in that will add value to the conversation
  - Newsletter
  - Relationship stories (Jim can write up 1 or 2)
  - New innovative programs and activities
  - Evidence based programming articles
  - Each person find an article about something they are currently finding interesting in the field and share that

**REFERENCE SECTION****Parks & Recreation Department****Mission Statement**

*(January 2011)*

Lake Oswego Parks & Recreation provides excellence in building community, enriching lives, and caring for the urban and natural environment.

**Lake Oswego Parks & Recreation Achieves Its Mission By:**

- ❖ Providing a variety of recreation, education, and human service programs that contribute to the health and well-being of people of all ages and abilities.
- ❖ Coordinating creative events that enhance community and add to the City's economic vitality.
- ❖ Promoting and expanding community partnerships, and opportunities for civic engagement that leverage resources to meet changing demands for recreation, human services, and natural area preservation.
- ❖ Maintaining the community's investment in the urban and natural environment, with an emphasis on sustainability, safety, accessibility, aesthetic quality and fiscal responsibility.
- ❖ Using collaborative public processes to establish community vision and priorities for the City's park system; while taking a systematic, balanced approach to planning, development and rehabilitation of parks, natural areas, and recreational facilities.

It should be:

"Enriching lives, enhancing the environment, encouraging community."



**LAKE OSWEGO ADULT COMMUNITY CENTER**  
**505 G Avenue, Lake Oswego, OR 97034 (503) 635-3758**  
**PROGRAMS-AT-A-GLANCE**

<p align="center"><b>CENTER SERVICES</b>  <i>Services May Require Prior-Arrangements  or an Appointment</i></p> <p>AARP/IRS Income Tax Assistance:  Grocery Shopping  Legal Assistance  Medicare Information &amp; Assistance  Social Day Respite Program for Older Adults with Dementia</p>	<p align="center"><b>OUTREACH SERVICES</b></p> <p>Consultations with Families, Individuals &amp; Caregivers  Information &amp; Assistance/Referral  Medicare &amp; Health Insurance Help  Monthly Food Baskets for Those in Need  Project Alert Registry  ( Contacts During Disasters/Emergencies/ Storms )  Senior Companion Program</p>
<p align="center"><b>LAKE OSWEGO MEALS ON WHEELS</b></p> <p>Home Delivered Meals M/W/F  Noon Meals Served at the Center M/W/F</p> <p align="center"><b>TRANSPORTATION SERVICES</b></p> <p>Shuttle Service To &amp; From Center M/W/F  Rides To &amp; From Medical Appointments By Prior Arrangement</p> <hr/> <p align="center"><b>MONTHLY SUPPORT GROUPS</b></p> <p>Arthritis Support  Caregiver Support for Those Caring for a Person with Dementia  Diabetes Support  Family Caregiver Discussion  Widowed Support</p> <p align="center"><i>Check Center for Scheduled Meeting Times</i></p>	<p align="center"><b>RECREATIONAL ACTIVITIES</b></p> <p>American Mah Jongg Open Play  Bridge (Weekly Pre-Arranged Groups)  Creative Hands  Jottings from 5<sup>th</sup> &amp; G Writing Group  Knitting  Lakewood Theater Dress Rehearsals  Movies  Pinochle  Quilters in Stitches  Scrabble  Special Interest Investment Group</p> <p align="center"><b>DAY TRIPS &amp; TRAVEL</b></p> <p>Day Trippers: Day Trips around Oregon &amp; Washington  Foreign &amp; Domestic Travel with Colette Travel  Let's Do Lunch!: Monthly Outing to a Restaurant  Portland Symphony Pops  Sunday Solo Dinner: Monthly Dinner at a Restaurant,  Designed for Older Adults Who Do Not Have a Significant Other</p>
<p align="center"><b>FITNESS / HEALTH &amp; WELLNESS /  CONSUMER PROGRAMS</b></p> <p>AARP Safe Driving Classes  Adult Fitness Classes  Aerobic Exercise to Music / Boomers Boot Camp / Gentle Yoga &amp; Gentle  Chair Yoga / Sit &amp; Be Fit / Strength Training / Tai Chi /The Total Body  Workout / Weekly Walkers / Zumba Gold 50+  Fitness Center  Cultural Classes: Art / Music / Dance / Arts &amp; Crafts  Educational Workshops &amp; Seminars  Health &amp; Wellness: Meditation for Health &amp; Happiness /  Stress Reduction / Nutrition Related classes</p>	<p align="center"><b>COMPUTER EDUCATION</b></p> <p>eBay / Facebook / How to switch to MAC from Windows / iDevice  Classes / Intro to Current Mac Operating System (OS)/Introduction  to Windows 8/Mac / iPad Users Group / Microsoft Excel / One on  One Tutoring / Power Point/ Supervised Lab / Word 2007&amp;2010</p> <p align="center"><b>MEMBERSHIP</b></p> <p>City Residents (Suggested Donation) \$40 Individual  \$55 Couple  Non-Resident (Fee) \$50 Individual \$75 Couple</p>

FOR UP-TO-DATE CLASSES, PROGRAMS AND SCHEDULES, CHECK OUR LIVING 50+ NEWSLETTER,  
OR VISIT US ONLINE AT [www.ci.oswego.or.us/acc](http://www.ci.oswego.or.us/acc)