

**SENIORS' PARTICIPATION IN COMMUNITY PLANNING:
THE RELEVANCE AND EFFECTIVENESS
OF A SENIORS' OUTREACH PROCESS**

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Abstract

This thesis explores the topic of seniors' participation in community planning. More specifically, it addresses the importance and relevance of including seniors, seniors' issues, and seniors' perspectives in community planning efforts, the circumstances under which seniors are most likely to become involved in community planning efforts, and guidelines for a practical process to encourage effective seniors' participation in developing local community plans. To address these issues, the thesis includes a review of the planning literature on public participation, a brief summary of relevant trends in gerontological literature, and an examination of the small amount of literature on seniors' participation in community planning. Two case studies in the District of North Vancouver, BC, "Seniors and the Lynn Valley Plan" and the "Seymour Local Plan Seniors' Forums," provide an example of a particular seniors' outreach process. This process is analysed for its effectiveness in including seniors, seniors' issues, and seniors' perspectives in local community plans and then factors influencing effectiveness are examined.

This thesis reveals that the inclusion of seniors, seniors' issues, and seniors' perspectives engenders more accurate planning, increases acceptance of community plans, exercises democratic rights and duties, and promotes self-sufficiency and self-worth in individuals and communities. Seniors are most likely to become involved in community planning efforts when they feel included: when they feel they are fulfilling a meaningful role, when certain emotional needs are satisfied by the planning process, and when they are able to take advantage of participation opportunities, that is, when aging-related needs are taken into account in designing and implementing planning processes. The process employed in the two cases studied, with

certain suggested improvements, is found to be an appropriate and effective method of including seniors, their issues, and their perspectives in community planning efforts.

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Chapter 1: Introduction

This thesis studies the links between two important forces: aging and planning. The former is a certainty, a universal and continuous process that often becomes all-consuming as we reach the last decades of life. The extent and nature of the latter is a matter of choice as individuals and communities create and change environments to suit their needs and desires. Despite the eventuality presented by the one and the opportunity presented by the other, there is often little or insufficient discussion of the intersection of the two. This thesis intends to help rectify this situation by exploring the participation of seniors in community planning efforts through a review of the literature and an examination of two relevant cases.

This chapter will introduce the reader to the topic of the present thesis as well as the rationale for, that is, the timeliness and significance of, the topic. It outlines the research problem treated here (in the form of three research questions) and briefly presents the two cases studied. Finally, it explains the limitations of the thesis, several important frequently used terms, certain principles that have guided the researcher, and the assumptions underlying the thesis. It concludes with a brief overview of the chapters to follow.

I. Topic and Rationale

Over the past several decades, public participation has become increasingly important and more widely accepted. Planners have taken to including more people in the process of decision

making and to making environments and processes more responsive to users. With this evolution in planning, it has become obvious that all population groups within a community do not participate in similar ways or to similar extents.

At the same time, it is evident that the Canadian population, like the population of other Western nations, is aging at a significant rate. The proportion of the population in older age cohorts, for example the population group over the age of 65, is increasing over time. The growth of older age groups in our population is prompting us to increase our efforts and focus with regards to studying issues relating to these groups and to including them in the community visioning and decision making.

This thesis is also significant and timely because it contributes to the integration of planning and gerontology. "Aging, families and senior citizens are all subjects that people often think they know firsthand. Yet, despite the existence of the field of Gerontology since the 1940s, there has been less integration of the new theories on aging, or the special research methods and skills from gerontology, into planning practice than might be expected."¹ It is the under-studied intersection of these two trends, that is, increased emphasis on public participation in community planning and a rapidly aging population with attendant increased interest in social gerontology, that forms the basis for the present thesis. While information, theory, and opinion abound in the separate fields of social gerontology and participation in planning, considerably less material exists at the intersection of the two fields, especially as regards the Canadian experience. To contribute to the small body of knowledge at this intersection, this thesis presents two case

¹ McClain, 1991, 22.

studies of seniors' participation in community planning efforts and draws lessons intended to be of use to policy makers, planners, and communities.

On a more practical level, various levels of government are increasingly accepting the importance of seniors' participation in community decision making. Municipalities in the Greater Vancouver area are now required by provincial law to submit municipal plans to the regional district: inclusion of seniors' perspectives increases the richness, accuracy, and appropriateness of these important guiding documents.

Of broader interest is the fact that the United Nations declared 1999 the International Year of Older Persons (IYOP): it is time that we capitalize on the increased awareness of seniors' issues generated by this declaration by considering community planning from an aging-conscious perspective. In fact, this thesis responds to the second, third, and fourth of five objectives for IYOP developed by the Canadian Ministers Responsible for Seniors' Issues, namely to:

"increase recognition of seniors' contributions to their families, their communities, and the country; improve understanding by all Canadians of how individual and societal choices and decisions made today will affect individuals and our society in the future; [and] encourage all sectors of society to be responsive to a diverse and aging population in a rapidly changing world."² This thesis responds to these objectives by providing knowledge intended to increase the sensitivity to aging in local community plans and planning processes.

² Jackson, 1998, 50.

II. Research Problem

Not enough attention has been paid to effective means of involving seniors in the development of local community plans. In response, this thesis addresses three questions:

1. Why is including seniors, seniors' issues, and seniors' perspectives in community planning efforts important and relevant?
2. What are the circumstances under which seniors are most likely to become involved in community planning efforts?
3. What practical process can be used to encourage effective seniors' participation in developing local community plans?

The thesis answers these questions in two ways. First, it reviews the current literature on social gerontology and participation in planning, in order to understand what is already known about seniors' participation in planning. Second, the thesis presents and analyses two case studies in the District of North Vancouver, British Columbia, Canada in order to contribute knowledge to the study of seniors' participation in planning.

The first case concerns the development of an Official Community Plan (OCP) for the Lynn Valley neighbourhood. In this case, the District's social planning department and local seniors service providers came together as a committee to discuss how seniors, seniors' issues, and seniors' perspectives could be more effectively included in the development of the plan.

Discussion groups on the theme “Supporting Healthy Seniors in Lynn Valley,” and a follow-up luncheon, were held to gather information about seniors’ perspectives on local issues of importance to them, such as housing, social and recreational activities, health, transportation, and pedestrian safety. This information was then presented to the Community Planning Team for inclusion in the plan. Following the drafting of the plan, a second set of discussion groups on “Seniors and the Lynn Valley Plan” was held to describe to seniors the draft plan as it related to seniors and to discuss whether the plan had accurately and effectively included seniors’ perspectives. This thesis focuses on the second set of seniors’ focus groups in Lynn Valley.

The second case concerns the development of a Local Plan for the Seymour neighbourhood. In this instance, the District planning department and the Seymour Local Plan Coordinating Committee decided it was important to include the opinions of several population groups, including seniors, that may not have been adequately represented in previous efforts to encourage public input. As such, a series of Seymour Local Plan Seniors’ Forums were organized to explain the Seymour Local Plan process to seniors and to elicit their opinions on a series of issues in the areas of housing, mobility, and community services. After the completion of the forums, a local coordinator of seniors’ recreation programs became the advocate for the findings of the seniors’ forums at Coordinating Committee meetings. The findings were included in the large amount of material provided to planning staff for preparation of a draft plan. This thesis focuses on the seniors’ forums held in Seymour.

Two important elements should be clarified at this point. Firstly, I was both the facilitator of the seniors’ outreach process used in the two cases as well as the researcher analyzing the seniors’ outreach process in the thesis research performed here. Secondly, although interesting

substantive information on local seniors' issues and opinions resulted from the two local planning cases (such information being provided in the Chapter on Case Studies for contextual purposes), this information is not the focus of the thesis. Rather, this thesis is concerned with *analysing* the seniors' outreach *process* used in the two cases in terms of its effectiveness in including seniors, seniors' ideas, and seniors' perspectives in the local planning process.

The cases are studied by means of a multi-faceted analysis of the seniors' outreach process. The outcomes of the case process are analysed, from the perspective of the seniors involved, the District planners, and the facilitator-researcher. The effectiveness of the process is also evaluated from the perspective of the District's public participation policy and participation guidelines from the literature. Factors influencing the effectiveness of the seniors' outreach process are also examined.

This thesis is limited by two logistical factors. In the first instance, the researcher does not control the timeline along which the two case studies are progressing. While the Lynn Valley case can be deemed completed (from the point of view of plan development), the development of the Seymour plan cannot be examined in its entirety as it is not yet complete. Secondly, the prime delimitations set by the researcher, include:

- the thesis timeframe: from the early 1990s until the Spring of 2000, with earlier contributions from the literature;
- the geographical delimitation: primarily the Vancouver Region, and possibly British Columbia, in terms of the generalizability of the case studies and Canada, or perhaps North America, in terms of the generalizability of the literature review and research findings; and,

- the age groups: the generalizability of the findings will, for the most part, be difficult to extend in their entirety to the extremely frail and the very elderly, but will otherwise cover those over the age of 50, with a focus on at-least-moderately-healthy individuals 65 years and older.

This study relies on three key terms, as defined by a general consensus in the Canadian academic and policy communities.

The first term, “senior,” used interchangeably here with the term “older adult,” is intended to mean an individual 65 years or older. This is the legal and practical definition of the term used by the Government of Canada and most other official bodies. It should be noted that when generalizing about the seniors studied in this dissertation and in similar pieces of research, this term actually best describes an individual who is at least moderately healthy and able. Also, the term “senior” is often casually used to describe those who are chronologically under the age of 65 (and usually over 50 or 55) and yet whose lifestyle and health approximate those of the 65-and-over age cohort. This study will make note of cases where these “younger seniors” are specifically included in or excluded from analysis.

The second term, “public participation,” requires some definition. This concept is variously referred to in both research and practice using phrases such as public participation, citizen participation, public consultation, public involvement, citizen involvement, stakeholder involvement, and other similar terms. Public participation is defined here as involvement and sharing in community planning processes by individuals and groups with a perceived or actual interest or stake(s) in the community, with the purpose of “influenc[ing] decisions about

programmes and policies which affect their lives.”³ The “public” in the term “public participation” will be taken to denote “specific users or ... individuals similar to potential users”⁴ of community resources. It is worthwhile to echo here what the planning process has internalized but does not always effectively address, namely that this ‘public’ is “made up of many different socio-economic and interest groups with different degrees of power as well as individuals who cannot or do not want to be identified with any particular group.”⁵

The third term, “outreach,” has been assigned the following operational definition: a concerted process which identifies those individuals and groups in need of a particular service, informs them about services, and supports them in accessing services and other resources to meet their needs.⁶ In this thesis, outreach consists of identifying seniors in the community who are stakeholders in the local planning process (potentially all seniors), informing them of opportunities to participate in particular planning efforts, and, most importantly, providing processes that they can reasonably access to effectively participate in planning efforts.

III. Principles and Assumptions

This study is based on a number of basic principles and assumptions, many of which will be examined in a later chapter, in a discussion of researcher bias, its impacts, and its mitigation.

³ City of Toronto Planning and Development Department, 1982, 4.

⁴ Kathler, 1987, 2.

⁵ City of Toronto Planning and Development Department, 1982, 4.

In the first instance, the following principles have guided the researcher:

- that the knowledge, experience and judgment of older adults should not be overlooked or undervalued in either research or policy development⁷;
- that consumers of a particular community service or resource should be involved in analysing its characteristics and judging its strengths and weaknesses; and,
- that the effective inclusion of older adults in community decision making is a right and responsibility, for both the community and the individual.

From these principles flows a set of major assumptions that underlie the present study and upon which the answers to the research problem and questions posed above will be based:

- aging is a multifaceted and fluid process;
- aging is not a homogenous process but rather varies within and between communities according to socio-economic factors, and hence can be affected by social and behavioural intervention⁸;
- it is possible to identify and respond to the needs and preferences of older adults within a community; and,
- seniors have the ability and responsibility to participate in community planning efforts and in the other forms of community decision making.

⁶ Provincial Senior Citizens Advisory Council, 1989, 1.

⁷ See Kathler, 1987, 3.

⁸ Riley in Schaie et al, 1988, viii.

IV. Outline of Thesis

This introductory chapter has discussed the thesis topic as well as its timeliness and significance. It has also presented the research questions and briefly introduced the cases studied. Finally, it has explained the limitations, terms, principles, and assumptions of the thesis.

Chapter Two, "Literature Review," will discuss what is already generally known about involving seniors in local community planning by examining empirical studies and theoretical frameworks, as well as the interrelationship between them. This chapter will briefly provide the social, political, and economic context that informs the study of seniors' participation in community planning. It will also examine possible definitions, relevant history, goals, methods, problems, and planners' roles as regards public participation as well as trends in social gerontology, ageism, and planning for an aging society. Finally it will provide answers from the literature to such questions as: why is seniors' participation worthwhile? why might special outreach efforts to seniors be warranted? what special factors could influence seniors' participation? and, what role(s) might a planner play in seniors' participation?

Chapter Three, "Introduction to the Cases," will present the two cases analysed later in the thesis, including a brief discussion of the processes, that is, focus groups and thematic analysis, used in the two cases.

Chapter Four, "Research Methodology," will provide the reader with an explanation of the research methodology employed to examine the two cases, namely participant observation, questionnaires, and interviews. This chapter will also address several methodological concerns.

Chapter Five, "Findings," will discuss the results of the research performed, from the perspectives of seniors involved, the District planners, and the facilitator-researcher. It will also evaluate the effectiveness of the seniors' outreach process from the perspective of the District's public participation policy as well as participation guidelines from the literature. Finally, it will examine the factors influencing the effectiveness of the seniors' outreach process.

Chapter Six, "Conclusions," will provide some important concluding comments stemming from the research performed. It will answer the research questions posed in the introductory chapter and discuss the importance of the research results, including implications for planning theory and practice. Finally, it will offer some suggestions for future research.

Table 1.1 (below) provides an overview of the research performed for this thesis and its relation to the cases studied.

Table 1.1 Overview of Case Studies and Thesis Research

Research Questions	Secondary Research: Literature Review	Cases and Case Processes: Two Planning/Seniors' Participation Processes	Primary Research: Evaluative Research of 2 Cases	Knowledge Product
<p>Developed to guide research into solving a current planning problem:</p> <ol style="list-style-type: none"> 1. Why is including seniors, seniors' issues, and seniors' perspectives in community planning efforts important and relevant? 2. What are the circumstances under which seniors are most likely to become involved in community planning efforts? 3. What practical process can be used to encourage effective seniors' participation in developing local community plans? 	<p>Provides understanding of relevant theory, context, and past planning practice regarding seniors' participation in local community planning</p>	<p>Introduces case focus groups and their context</p>	<p>Analysis of the seniors' outreach process used in two cases to determine:</p> <ol style="list-style-type: none"> 1. effectiveness of the process 2. factors influencing the effectiveness of the process 	<ol style="list-style-type: none"> 1. Why seniors' participation in important and relevant (secondary research supported by primary research) 2. Circumstances under which seniors' participation is most likely (partially suggested through secondary research and enriched by case study analysis) 3. Practical process for encouraging effective seniors' participation (suggested guidelines for future processes partially suggested by literature and refined through case study analysis)

Chapter 2: Literature Review

The purpose of this literature review is to determine what is already generally known about involving seniors in local community planning. In this regard, empirical studies and theoretical frameworks, as well as the interrelationship between the two, will be examined. This chapter answers two questions: what is, briefly, the social, political, and economic context that informs the study of seniors' participation in community planning? and, what has already been learned about seniors' participation in community planning? It also serves to identify the gaps in current knowledge, gaps that this thesis will, in some way, help to fill.

The literature review is based on a search of the following resources, within the fields of social gerontology, community planning, and public participation:

- books and monographs;
- journals;
- government and NGO documents (reports, handbooks, manuals, etc.); and,
- Internet websites (using: several large search engines to locate specific sites; the websites of specific seniors organizations and their internet resource listings; and, federal and provincial government sites on seniors).

The following locations have served as access points for the resources listed above: the library of the University of British Columbia, the library of Simon Fraser University, and the Simon Fraser University Gerontology Research Centre Library

As stated in the introductory chapter, there is a mass of information, theory, and opinion dealing with the two separate fields of social gerontology and community planning. However, the literature at the intersection of these two fields is meagre, both in quantity and quality. The amassed literature on seniors and community planning has focused almost exclusively on the outputs, not the process, of planning for an aging society. Scholarly and practical writing in the planning field has for many years intimated, or in some instances insisted, that professionals need to plan *for*, that is, plan *on behalf of*, older adults.⁹ Gerontology, for its part, has primarily focused on the individual experience of aging, whether biological, psychological, or social. In those instances where the gerontological literature deals with the participation of older adults in community and society, the suggested actions tend to be limited to voting and volunteering.¹⁰ The paucity of the body of literature covering the *process* whereby seniors, their issues, and their perspectives are incorporated into community planning efforts provides some justification for the present work.

I. The Larger Context

It is worthwhile to briefly examine the social, political, and economic context in which seniors' involvement in planning takes place. The examination of long-term trends and societal environments enables us to better understand the structural opportunities and barriers that can dramatically impact seniors' involvement, principally in the areas of demographics and policy making.

⁹ See, for example, Ministry of Municipal Affairs and Housing, *Towards Community Planning for an Aging Society*, 1983 and even *Plan Canada*'s July 1998 issue "Planning for Seniors."

¹⁰ See Regnier in Woodruff and Birren, 1983; McPherson, 1990; Novak, 1997; and Gifford, 1990.

The larger context is, firstly, marked by the overwhelming importance of population characteristics and demographic change. Seniors, as a population group 65 years and older, are growing in both absolute and relative terms, in Canada and other countries. In the first instance, absolute numbers of individuals over the age of 65 are increasing concurrently with increases in total national population counts.¹¹ In the second instance, the proportion of seniors is increasing relative to other age cohorts. Statistics Canada notes that the percentage of our population aged 65 or older has increased from 7.6% in 1961 to 11.8% in 1991 and will reach a projected 23.8% in 2031.¹² Population aging can be attributed to decades-long trends of declining fertility, declining mortality and improvements in life expectancy (both through improved medical knowledge and practice), and, in some cases, immigration.¹³ As the baby boomer generation ages, this will eventually increase the proportion of seniors in the population, and factors such as rural/urban distribution, sex ratios, and ethnicity all further impact these demographic considerations.¹⁴ Given these demographic characteristics and their ramifications, we would be wise to plan as accurately as possible today, rather than face unprepared a large-scale crisis in the future.

In addition to their growing proportional importance, today's seniors are also quite different than seniors of earlier years: they are generally more mentally and physically healthy, with improved economic situations.¹⁵ Statistical projections suggest that *tomorrow's* seniors will remain healthier and active for longer, will be more educated and have broader interests, and will simply

¹¹ McPherson, 1990, 85.

¹² Statistics Canada, 1990, 11; and Norland, 1994, 7.

¹³ Moore and Rosenberg, with McGuinness, 1997, 8-14; Gosselin, 1984, 2-3; Howe, Chapman and Baggett, 1994, 3; Wood, 1992, 5.

¹⁴ See also McKie and Thompson, 1990, 17-20.

¹⁵ National Advisory Council on Aging, 1999, 5.

live longer.¹⁶ The Organization for Economic Co-operation and Development, in a 1992 report entitled *Urban Policies for Ageing Populations*, explained a number of the ramifications of population aging, including:

- “A growth in demand for all kinds of services.”
- “Political pressure for more publicly provided housing, health, social services and pensions.”
- “The need to acknowledge competing [intergenerational] claims so that they can be discussed in a constructive manner.”
- “The need for choice by elderly people.”¹⁷

In addition to demographics, the larger context is informed by a second important factor: the structural policy environment in which community planning and seniors participation finds itself. Two interlinked factors are at play here: firstly, the increasing complexity of policy making and service delivery as it relates to seniors’ daily experience and, secondly, the locus of policy making and fiscal responsibility for “seniors’ issues.”

In the first instance, as our world has become increasingly complex, so has our decision making about our world, including the creation of social policy. Simply put, as our world and society change and evolve, we have ongoing problems to treat as well as new ones. One author explains that we need new ideas, approaches, and services to “address the challenges and difficulties of modern life.”¹⁸ In the case of seniors and community planning, this increasing complexity can be seen in a single example: increasingly long lives for larger numbers of seniors (with new

¹⁶ Howe, Chapman and Baggett, 1994, 4-5; and Ministry of Municipal Affairs and Housing, 1983, 6-7.

¹⁷ Organization for Economic Co-operation and Development, 1992, 50-52.

medical concerns and supported by new medical technology) can result in more seniors receiving care in their homes as well as a greater need for supportive care facilities. This in turn impacts planning for local neighbourhoods and entire municipalities as houses do not become available for younger families and space is needed to build care facilities.

In the second instance, the locus of policy making and fiscal responsibility for seniors and seniors issues has shifted in recent years. Federal governments have become increasingly concerned with reducing the national debt and deficit (a noble concern) and as a result have cut their fiscal and policy support of various social programs.¹⁹ But neither provincial nor municipal governments have been willing or able to fill this void. British Columbia, for example, has the lowest government spending of all Canadian provinces, both as a percentage of our GDP and in numbers of public sector employees,²⁰ and there are ongoing complaints that federal to provincial transfer payments are insufficient given our growing population and increased social concerns. Municipal governments, for their part, are often unable to respond with resources of their own as they are, under provincial law, constrained from incurring debt or borrowing. This situation of government downloading leaves families and individuals 'holding the bag.' As one author puts it, cuts in government spending and responsibility translate into "lower quality service, reduced access to needed services, and higher out-of-pocket expenses."²¹ For seniors, this can translate into a variety of planning-related concerns: poverty, inappropriate housing, medical costs and waits, reduced access to transportation, and much more.

¹⁸ Klein and Lee, 1999, 1.

¹⁹ Klein and Lee, 1999.

²⁰ Vogel, 2000, 7.

²¹ Vogel, 2000, 1.

The "larger context" briefly presented above should provide a grounding for the discussion of public participation, social gerontology, and the interrelationship of seniors and planning that follows.

II. Public Participation in Community Planning

At its most generic, planning is "a method of decision making which proposes or identifies goals or ends, determines the means or programs which achieve or are thought to achieve these ends, and does so by the application of analytical techniques to discover the fit between ends and means and the consequences of implementing alternative ends and means."²² Community planning is therefore the process by which we decide the appropriate future for a given community, including the manner in which we can reach this future of community well-being. One of community planning's principal purposes is, according to our own provincial Ministry of Municipal Affairs, the provision of "processes and approaches to bring individuals, groups, communities and governments together" in order to "develop solutions which can improve and sustain the community's overall quality of life."²³

The notion that public participation plays a relevant, and even important, role in community planning has long been a point of discussion in planning circles. Decades ago, planners noted: "it is becoming more evident each day that if planning is to have some relevance as a contemporary urban institution, responsive to the needs of its citizenry, it must incorporate some

²² Herbert Gans. "City Planning in America: A Sociological Analysis," in *People and Plans*, Herbert Gans, ed., New York, NY: Basic Books, 1968, 57 as cited in Ferrandino, 1970, 2.

²³ Ministry of Municipal Affairs, 1996, 1.

form of citizen participation into the decision making process” and, furthermore, that “planning, as a mechanism seeking to enhance the choices and opportunities of the individual, while at the same time striving to promote his physical, social, and economic well-being should, by definition, be concerned with the participatory input.”²⁴

The sections that follow will describe, in some small measure, the major factors involved in public participation, namely: definitions and history of participation, goals or purposes of and reasons for participation, approaches and methods, problems with participation, and the planner’s role in participation. Given the vast amount of literature on citizen participation, the focus is necessarily on those areas that provide context for seniors’ involvement in community planning.

1. Definitions of Participation

Public, or citizen, participation can be defined as “a systematic process which provides an opportunity for citizens, planners, elected representatives and members of relevant area agencies to share their experience, knowledge and goals, and to combine their energy to create a plan.”

This plan, in turn, “can then reflect their knowledge and best judgment at the time and will be understood and actively supported by most of those affected by it.”²⁵ On a more political level, public participation can refer to the “actions that citizens take to influence the structure of government, the selection of government authorities, or the policies or administration of government.”²⁶ It can also often be government- rather than citizen-directed: “public

²⁴ Ferrandino, 1970, 9-10, 11.

²⁵ Connor, 1985, I-1.

²⁶ Kubiski, 1992, 1.

involvement is a cooperative, inclusive process where government engages people and communities (geographic or sectoral) in meaningful ways in the 'business' of governing."²⁷

Regardless of the precise definition employed, public participation in planning requires, obviously, both participation and a public. In the first instance, this participation can take a variety of forms, as explained further in the section below on approaches and methods of participation. The second instance revolves around the notion of a 'public': who (definitionally) is this public, who should participate in public or citizen participation, and who actually participates? On a theoretical or philosophical level, the public is comprised of citizens, where "a citizen is a person who lives in and is entitled to all the rights of a democracy," and who "is also responsible for protecting and preserving that very democracy."²⁸ In this sense, the notion of citizenship within a democracy means that "the concept of citizen participation is inherent in the functioning of democracy."²⁹ On a more practical level, the public includes community associations, special interest groups, members of the public who sit on various government or agency committees, and the general, usually unorganized, mass of community residents (and/or businesspeople) and interested individuals.³⁰ Specific types of groups and individuals should be involved in public participation: governments tend to look for participation by "people interested in a general planning issue or living, working or owning property or businesses in an area as well as organizations, institutions, etc."³¹ However, those same governments do recognize that the people who actually participate in community planning tend to be those most directly affected by an issue (especially those threatened by proposals for change), and for the

²⁷ Government of Saskatchewan, 1994, 3.

²⁸ Kubiski, 1992, 2.

²⁹ Kubiski, 1992, 2.

³⁰ City of Calgary, 1993, 6.

³¹ City of Toronto Planning and Development Department, 1982, 6.

most part professionals, educated people, and/or leaders of special interest groups.³² This hints at the rather obvious fact that those individuals who participate the most or the most effectively are those who are able or willing to participate, a condition massively affected by such characteristics as age, gender, ethnic background, languages spoken, level of education, mobility, and so on.

Both citizens and community groups, on the one hand, and governments, on the other, have expanded upon the various definitions of participation by developing standards, principles, and the like. For example, one community perspective notes the following “signs” that public participation is in fact occurring, namely:

“planners listen to residents concerning their attitudes, goals, fears and factual suggestions; citizens find early and convenient opportunities to make positive contributions; citizens learn from planners and others a broader and deeper knowledge and understanding of their environment, its potential and its fragility; individuals, interest groups and agencies are identifying their own positions, recognizing those of others and working towards a win-win solution...; relationships between planners, politicians and other people are strengthened so that communication barriers are breached, and mutual trust increases as a foundation for communities to function more effectively in every way.”³³

In order to clarify and facilitate participation processes, governments have also put effort into refining the definition of participation, for example, by developing “principles” of participation, such as: cooperation; belief in the potential of people and the ability of communities; equity; respect for diversity; affordability; and, openness, honesty, and accountability.³⁴

It is worthwhile noting that the definition of public participation has developed over time to include two important foci: (1) including more people in the various levels of decision making

³² City of Toronto Planning and Development Department, 1982, 7.

³³ Connor, 1985, I-1.

³⁴ Government of Saskatchewan, 1994, 8-9.

and (2) making environments and processes more responsive to users. In other words, participation is, over time, responding to both of the factors involved in community-based, coordinated planning: organizing (as in mobilizing individuals and groups towards the goal of community development) and planning (as in developing and selecting policies and programs in light of “facts, projections and applications of values”).³⁵

2. History of Public Participation in Community Planning

Planning has, over the last century, gradually incorporated the notion, and often the practice, of public participation. While early involvement in planning was “somewhat limited to the economically advantaged classes and focused on the aesthetic qualities of cities,”³⁶ the 1960s and the decades that followed saw a true and rapid expansion in the meaning and practice of public participation. Canadian cities saw increased protest of, and public participation in, expressway and urban renewal projects. These mirrored American efforts, including their poverty alleviation programs and urban renewal projects with notions of “maximum feasible participation” and “widespread citizen participation,” as well as the *Economic Opportunity Act* of 1964 and the *Demonstration Cities and Metropolitan Development Act* of 1966 (*Model Cities*).³⁷

The entrenchment of public participation in planning can be traced to a wide variety of possible causes and triggers: Athenian notions of direct democracy; Rousseau’s social contract; US democratic principles and theorists of the American Revolution; the general activism of the sixties with its greater awareness of racial inequality and environmental values; and/or general

³⁵ R. Perlman and A. Gurin. *Community Organization and Social Planning*. Toronto, ON: Wiley, 1972 as cited in BC Research, 1986, 7.

³⁶ Paton, 1998, 17.

societal disillusionment with planning practice in the face of the complexity of modern life and the myriad institutions created to deal with it.³⁸ Regardless of cause, at least the *notion*, if not the *practice* of public participation, as one author stated, “has now been institutionalized.”³⁹ In fact, enacted by the BC Legislature in July of 1994, Bill 25 “supports local governments to build upon and to enhance their relationship and accessibility within their communities and with other levels of government” including “coordinating resources and processes that facilitate problem-solving and wide-spread citizen participation in community affairs and direction.”⁴⁰

This state of affairs should not however promote confidence that the ‘right to public participation’ has been definitively secured. Where “there is uncertainty over the appropriate rate of expansion and when the influx of new participants creates a serious strain on the existing institutions,”⁴¹ pressures to reduce the degree of public participation (due to increased complexity, cost, etc.) may become irresistible to local governments. When economic recession turns planners and elected officials to courting developers, participation may again come under fire. All this to say that, although the concepts and practices of public participation are well-known and often applied, participation in community planning is by no means guaranteed.

3. Goals or Purposes of and Reasons for Participation

There are a variety of important, or at least relevant, purposes or goals of public participation in community planning. In the first instance, one of the goals of participation is the fulfillment of

³⁷ Morrison, 1973, 3. See also Burke, 1979, 13.

³⁸ Booher, 1974, 22-24, 24-25; Cullingworth, 1984, 1; and Kweit and Kweit, 1981, 4.

³⁹ Cullingworth, 1984, 1.

⁴⁰ Ministry of Municipal Affairs, 1996, 2.

the practice of democratic government, that is, democracy in its noblest sense. Participation supports the public interest, accountability, and fair representation.⁴² "Citizen participation is important as an essential component of the democratic faith we profess in the dignity and worth of the individual. In this view citizen participation is an essential element in maintaining the consent of the governed and in assuring that power is coterminous with authority."⁴³ On a more practical note, participation also contributes to "people's knowledge of how government operates and how decisions are made and implemented,"⁴⁴ including "the necessary compromises and 'satisficing' that characterize government decisions."⁴⁵

A second purpose of participation in planning centres on the accuracy of planning policy and practice. Participation permits local governments to collect data that might not otherwise be available from groups and individuals who bring specific skills, technical expertise, knowledge, creative capacity, values, and priorities to the planning process.⁴⁶ "Planners, developers, owners and tenants and other people living and working in communities or otherwise involved in an issue, possess different types of knowledge. All of this knowledge is needed to make planning decisions."⁴⁷ "The citizen, by his or her involvement, can provide planning with information and judgement not only regarding their needs but also regarding local systems and possible improvements in the adaptiveness of these systems."⁴⁸ "Participatory models are designed to... increase the fit between the interests reflected in the plan and those held by individuals on whose

41 Lucian W. Pye, *Aspects of Political Development*, Boston, MA: Little, Brown, 1966, 65 as quoted in Kweit and Kweit, 1981, 4.

42 McNeil, 1993, 7-8; and Government of Saskatchewan, 1994, 9.

43 Booher, 1974, 72.

44 City of Toronto Planning and Development Department, 1982, 5.

45 Kweit and Kweit, 1981, 35.

46 Burch, 1996, 187-189; and Connor, 1985, I-1.

47 City of Toronto Planning and Development Department, 1982, 5

48 Booher, 1974, 78.

behalf plan making is undertaken. The assumption underlying such models is that by increasing the participation of all parties affected, a better fit will result.”⁴⁹

In the third instance, participation tends to promote improved public acceptance of proposed plans. While from the citizen’s perspective participation increases a plan’s appropriateness (actual needs are better met), from the local government perspective participation increases legitimation and effective implementation of the plan from participant-supporters, deliverers and users.⁵⁰ More bluntly put, participation increases acceptance while decreasing or even co-opting potential opposition.

A fourth and final purpose of participation focuses on the empowerment of individuals, groups, and communities. The emphasis here is on citizens’ increased awareness of local issues, influence over their lives, enhanced self-sufficiency, personal and community accountability, and ability to shape their individual and collective future.⁵¹ Participation may mobilize otherwise dormant energies and resources in marginalized populations: “the process of participation can itself be so rewarding that other demands, particularly upon the economic system, can be reduced.”⁵² Philosophically speaking (from an Aristotelian perspective), participation fulfills the human need to take part in the actions of the polity and thereby lead a satisfying life.⁵³

Viewed from the other (negative) side, planning that does not incorporate public participation can obviously not fulfill any of the above-mentioned goals. Such planning promotes “apathy and

⁴⁹ Mayer, 1985, 93.

⁵⁰ Burch, 1996, 189.

⁵¹ Government of Saskatchewan, 1994, 9; and City of Toronto Planning and Development Department, 1982, 5-6.

⁵² Booher, 1974, 76-77, 85.

a lack of awareness about community affairs resulting in fewer or limits to community choices and solutions and an overall lower quality of life for the community; and community tension and conflict which may remain unresolved or may increase if solutions are not forthcoming and the community lacks a public process to resolve its differences.⁵⁴

It should be noted that these goals or purposes of participation are not without their problems and conflicts, including:

- how to prioritize goals according to both citizen and government needs/desires;
- lack of precision in defining goals, leading to single interest group domination of goals and standards for evaluation (leading to dissatisfaction with participatory mechanisms);
- citizen need for influence competing with government need for social control;
- lack of mutual exclusivity amongst specific goals, where the fulfillment of one particular goal complicates the attainment of another; and
- confusion between normative and empirical goals, where a particular goal may be the result of wishful thinking and hence not executable.⁵⁵

Problems notwithstanding, the goals or purposes of citizen participation in community planning, provide a number of benefits. For present purposes, although many have been discussed or alluded to above, a number of the benefits of participation are consolidated below. For example, one government source lists the following set of benefits of participation: new ideas and a wider range of opinions results in better decisions; more information and public fora beget a more representative social consensus; decisions benefit a wider range (or all) members of a

⁵³ Kweit and Kweit, 1981, 35.

⁵⁴ Ministry of Municipal Affairs, 1996, 23.

community; shareholders increase their support of decisions they participate in; and, people and groups that have been historically excluded (such as seniors) are now included in decision making processes.⁵⁶ Upon examination, this list appears quite philosophical and is in parts perhaps more wishful thinking than actually achieved benefits. A more detailed, and perhaps more practical, list of the benefits of public participation in the planning process is provided by an academic author, as follows:

1. "a more legitimate planning process;
2. valuable information
3. the identification of critical issues, new alternatives, potential conflict, opportunities and solutions;
4. development of plans, testing of communication techniques;
5. encouragement of wider participation;
6. documentation of community opinions, values and attitudes;
7. a two-way information flow;
8. consultation made available to elected officials and administrators;
9. improved social and political awareness for involved citizens;
10. more social integration, people aware of implications of public policy upon themselves and others;
11. increased respect and trust of the political and bureaucratic system due to individual responsibility."⁵⁷

⁵⁵ Kweit and Kweit, 1981, 36-38.

⁵⁶ Government of Saskatchewan, 1994, 9-10.

⁵⁷ Enns, 1983, 18.

Finally, the discussion of the goals, or purposes, and benefits of public participation in community planning naturally leads to a summary of the reasons, or rationale, for participation. Obviously, as stated above, participation is valuable and reasonable because of the value of the community knowledge and resources it can contribute, and it follows, the potential for improved effectiveness and appropriateness of programs and policies.⁵⁸ Secondly, participation can promote dignity, self-sufficiency, and self-worth, supporting the claim that participation is an individual and community right. "Planning decisions, public and private, influence the quality of people's lives and may change their social and physical environments.... [P]eople have a right to participate in the making of those decisions which directly affect them."⁵⁹ Finally, participation is justified by the very simple fact that communities are demanding it: individuals, groups, and the community as a whole are more able and willing to participate in decision making on planning issues, and are insisting upon this opportunity to be involved.⁶⁰ Increased levels of education, improved communication media, improved living standards, growing numbers of poor and/or disillusioned residents, and an increasing complexity of life have all promoted this growing interest in, and demand for, participation in planning.⁶¹

4. Approaches and Methods of Participation

Since its gradual introduction some decades ago, public participation in community planning has seen a variety of approaches and methods in its implementation. The most well-known approach to understanding participation is likely Sherry Arnstein's work, "A Ladder of Citizen

⁵⁸ Edgar and Jean Cahn, "Citizen Participation," in *Citizen Participation in Urban Development*, Hans C. Spiegel, ed., Washington, DC: NTL Institute, 1968, 221 as cited in Ferrandino, 1970, 2; and Government of Saskatchewan, 1994, 7.

⁵⁹ City of Toronto Planning and Development Department, 1982, 5.

⁶⁰ Government of Saskatchewan, 1994, 7.

Participation,” in which she produces a typology of eight levels of participation, ranging from the non-participatory levels of manipulation and therapy, through degrees of tokenism seen in informing, consultation, and placation, and finally to degrees of citizen power found in delegated power and citizen control.⁶² The intent is not to delineate eight different types of participation but rather to demonstrate that methods of participation fall into a spectrum, ranging from false participation in, to community/citizen control of, planning, where the standard is the degree to which a method redistributes power amongst societal groups. Over the years, criticisms of Arnstein’s model have led to other suggested spectra or linear typologies:

- where a spectrum ranges from government control to citizen control (with shared decision making as the goal);⁶³
- where citizen participation methods fall into a continuum of three main points: “access to information; opportunity to communicate with decision makers; and authority to make decisions;”⁶⁴ or,
- where a process evolves through stages of education, information/feedback, consultation, joint planning, mediation, litigation and resolution/prevention of public controversy⁶⁵.

Many authors do draw on earlier work in determining sets of approaches, for example positing four “major civic strategies” for citizen participation: co-option, consultation, social therapy (or education) and community power⁶⁶ (remarkably like levels on Arnstein’s ladder).

⁶¹ Enns, 1986, 20.

⁶² Arnstein, 1969, 217.

⁶³ McNeil, 1993, 15, 17-18.

⁶⁴ Morrison, 1973, 6.

⁶⁵ McNeil, 1993, 15. See also City of Toronto Planning and Development Department, 1982, 8-9 for a description of a cumulative process.

⁶⁶ Donna L. Sorkin, *The Community Development Strategies Evolution: A Local Government Perspective*, Washington, DC: Public Technology, 1981 as cited in Enns, 1986, 23.

Others have avoided spectrum or linear classification of public participation in planning in favour of a specified *set* of approaches. One author sees a deeper meaning to participation where public involvement actually represents such other phenomena as:

- participation as market research;
- participation as decision making;
- participation as dissolution of opposition;
- participation as social therapy; or,
- participation as grass-roots radicalism.⁶⁷

One government agency views participation as resulting in practical opportunities for government, namely:

- direction (where government bases policy direction on elected mandate or other values and is driving a policy or plan);
- education (using information to “change attitudes, enhance skill development and ensure informed decision without raising expectations of participation in the planning process”⁶⁸);
- information/feedback (using information to “create an awareness of an issue, policy or program and request feedback or public response to information on trends issues, policies and programs”⁶⁹);
- consultation (“formal dialogue between government and the public to achieve a common understanding of an issue or policy, solutions and advice”⁷⁰);

⁶⁷ Sarkissian and Perlmut, 1994, 9-10

⁶⁸ Government of Saskatchewan, 1994, 4.

⁶⁹ Government of Saskatchewan, 1994, 4.

⁷⁰ Government of Saskatchewan, 1994, 5.

- partnerships (sharing a certain level or amount of responsibility and decision making power);
- delegation (transfer of responsibility to a different level of government, stakeholders or the public); or,
- self-determination (government creates an autonomous organization through the delegation and devolution of power to a different level or group).⁷¹

Other planning research draws in a larger discussion of theoretical approaches to public participation, such as:

- collaborative planning (as developed by Godschalk, where governments and citizen continuously cooperate);⁷²
- advocacy planning (developed by Davidoff, where planners advocate for both government and public/community group interests, considering alternative plans developed by a variety of interests);⁷³ and,
- transactive planning (developed by Friedmann, where planning “proceeds by a process of mutual learning between the technical expert and client groups”).⁷⁴

On the most practical level, participation can be translated into a number of different models, methods and techniques, such as:

- intensive negotiation;
- notifying and commenting;

⁷¹ Government of Saskatchewan, 1994, 4-5.

⁷² David Godschalk, “The Circle of Urban Participation,” in *Naming Megalopolis, Volume II*, H. Wentworth Eldredge, ed., Garden City, NJ: Anchor Books, 1967, 972 as cited in Ferrandino, 1970, 12.

- intervening (addressing council directly at a public hearing);
- appealing a decision;
- advisory committees;
- official representation (representative elected by a constituency or selected by government);
- random polling;
- representative individual or opinion leader (government selects a representative perceived to be similar to the average member of the constituency or who is publicly recognized as reflecting what constituency wants);
- internal key informant (constituency member identified as a someone who knows about his or her group);
- expert external key informant (expert in the subject area);
- advocate (advocates for constituency of which he/she is not personally a member);
- electoral participation;
- interest group participation (which then presents information and opinion to government);
- direct citizen-government contact (phoning, visiting, surveying, or holding public meetings);
- surrogate planners (planners acting on behalf of public);
- neighbourhood associations (including congresses of neighbourhood associations);
- neighbourhood advisory committees (or neighbourhood councils);
- interactive workshop participant; and

⁷³ Paul Davidoff, "Advocacy and Pluralism in Planning" in *Naming Megalopolis, Volume II*, H. Wentworth Eldredge, ed., Garden City, NJ: Anchor Books, 1967, 597 as cited in Ferrandino, 1970, 12.

⁷⁴ Booher, 1974, 52.

- many other specific models, methods and techniques.⁷⁵

5. Problems with Participation in Planning

Given that planners, governments and communities have been engaging in participatory processes for a number of decades now, it is only natural that flaws, concerns, failings, and other problems have come to light. These problems can be grouped around four different themes:

- local government structure;
- public expectations;
- representativity; and,
- evaluation of success.

In the first instance, some structural details and policies of local government obscure or even hinder public participation in local community planning efforts. One author goes so far as to describe this phenomenon as follows: “in essence, the anomaly of citizen participation is that democratic expectations have been imposed on governmental structures that were never designed to function democratically.”⁷⁶ This plays out in a variety of different practical ways:

- the difficulties with or inability to incorporate the public’s ideas into the present structure and traditions of government;⁷⁷
- “the lack of [public] guidance as to how changes necessary for citizen participation are to be achieved or even what institutional changes are needed”;⁷⁸

⁷⁵ Burch, 1996, 192-195; City of Calgary, 1993, 7-9; Enns, 1986, 25; H. Hallman, *Neighbourhoods: Their Place in Urban Life*, London: Sage, 1984 in Enns, 1986, 26-27; Kweit and Kweit, 1981, 54-56; Novak, 1997, 323-326.

⁷⁶ Kweit and Kweit, 1981, 7.

- the risk of creating 'parallel bureaucracies' outside of local government which nonetheless require the local government bureaucracy to monitor their actions;⁷⁹ and,
- the lack of political will (in local government) needed for the participative processes and structures to function effectively.⁸⁰

In the second instance, public expectations have played a tremendous role in the past and present problems with public participation in community planning efforts. Public expectations may be either unrealistic or in conflict with other planning policies or issues (even within a given participatory process), but the crux of this issue is how such public expectations arise. It is only natural that a community have specific, and even quite high, expectations of a participatory process, but who or what is to blame for allowing such expectations (if they are indeed inappropriate or impossible to achieve) must be addressed. There appear to be two major issues at stake here: "first, once citizens are informed and have communicated their wishes, dissatisfaction is likely to be high if plans or political decisions are unresponsive to their input. Second, citizens, lacking clear initial guidelines or understanding, may interpret a mandate for decision making which in fact has not been delegated."⁸¹ That is to say, the problem of expectations stems from, on the one hand, government unresponsiveness to the results of participation or, on the other hand, lack of clarity from the outset in the intent, objectives, and groundrules of the participation process.

⁷⁷ Booher, 1974, 55.

⁷⁸ Booher, 1974, 56.

⁷⁹ Kubiski, 1992, 10.

⁸⁰ Kubiski, 1992, 10.

⁸¹ Morrison, 1973, 7.

In the third instance, problems with participation can centre on issues of representativity in the process. Although difficult or perhaps impossible to achieve complete representativity of the community in any given process (barring the participation of every resident!), how the issue is handled goes a long way towards ensuring that representativity is a procedural issue, rather than a central substantive one. The main reality is that individuals and groups within a given geographical community (geography often being the parameter for participation) always exhibit, sometimes enormous, disparities in the resources that encourage or permit them to be involved in public participation efforts.⁸² Discussions of barriers to participation that impact representativity are multifaceted: some people will "conclude that individuals on the periphery are consumed with the process of survival and, as a result, have little time or interest for entering the political arena. Others suggest that competing opportunities are far more important than civic participation, and that inactivity simply reflects the low priority attached to participation."⁸³ With government 'cutbacks,' participation efforts can rely even more heavily on the time and efforts of community members, despite the way that community inequalities translate this into greater disparities in participation.⁸⁴ Specific problems in the area of representativity include:

- reliance on community leaders to represent communities;⁸⁵
- the capture of the process, program, or resource involved in participation by stronger and/or better organized groups;⁸⁶
- the disempowerment of individuals within community groups where the group requires a united front to participate in planning;⁸⁷ and,

⁸² See Booher, 1974, 56; Kubiski, 1992, 9-10; and Sarkissian and Perlmut, 1994, 6.

⁸³ Kasperson and Breithart, 1974, 9.

⁸⁴ Kubiski, 1992, 9-10.

⁸⁵ Kubiski, 1992, 10.

⁸⁶ Kubiski, 1992, 11.

⁸⁷ Kubiski, 1992, 12.

- the designation of expert status for outside professionals or service providers (where the community experience is devalued, either implicitly or explicitly).⁸⁸

A fourth and final theme in the problems of participation centres on evaluation and general measures of success. Some claims can be made for a lack of theoretical or practical basis from which to determine whether citizen participation will be successful in a given instance and why,⁸⁹ a gap this thesis will in some measure help to fill. As one author stated, "too often, consultations are structured so that the scope within which advice is rendered is very limited, the agenda is already established, the options predetermined, or the advice sought too early or too late in a planning timetable."⁹⁰ All these particulars reflect a lack of knowledge or awareness about what makes for successful participation, not least because evaluation may not be performed, and lessons even more rarely shared with other planning agencies.⁹¹

6. Planner's Role(s) in Participation

The previous sections have provided a number of clues as to the possible roles of the planner in public participation. These often revolve around awareness, as in awareness of principles, goals, approaches, methods, techniques, benefits, and problems of public participation in planning. They also include the responsibility to include the widest number and variety of people and interests in participatory efforts as well as an increasing responsibility for creating processes and environments. Most basically of all, the role entails a commitment to the importance and relevance of public participation for effective community planning. One author sums it up as

⁸⁸ BC Research, 1986, 6

⁸⁹ See Booher, 1974, 57; and Cullingworth, 1984, 17

⁹⁰ Kubiski, 1992, 6.

follows: "there are two basic areas in which the planner can contribute to improving the process of citizen participation. The first area is effective structuring of the communication process. The second is the utilization of effective citizen participation aids to make the communication process productive."⁹² The planner's role is as both champion of the cause and implementer of processes.

III. Social Gerontology

In the examination of seniors' involvement in community planning, much research can be drawn from the area of social gerontology, that is the study of aging and the older adult from a social or societal perspective. This section examines trends in social gerontology relevant to seniors' participation in planning as well as the notion of ageism as an excluding force in community decision making.

There are, according to the literature, three fundamental areas in social gerontology generally recognized by gerontologists to be priority study areas, namely: "first, the development of sound theory; second, the redefinition of the subject's core problem with less attention being paid to the needs and problems characteristic of the very old and more attention being paid to the process of aging. And third, that social gerontologists need to listen more carefully to the clients or users of services."⁹³ Despite the loftiness of these priorities, social gerontology, leaning heavily on multidisciplinary, has actually begun to tackle these issues. Political economy brings an "awareness of the structural pressures and constraints affecting older people, with division

⁹¹ McNeil, 1992, 21.

⁹² Morrison, 1973, 7.

associated with class, gender and ethnicity being emphasized.”⁹⁴ Humanistic and biographical approaches raise the “concern of the absence of meaning in the lives of older people, and the sense of doubt and uncertainty which is seen to pervade their daily routines and relationships.”⁹⁵ And finally, politics, economics, the humanities, and the social sciences all contribute to a focus on ageism/exclusion and the empowerment of the older individual in society.⁹⁶ These expanding notions about the realm of social gerontology have brought planning-related issues, such as aging in place, active lifestyles, independent or supported living, self-determination, fulfillment, and lifelong learning⁹⁷ to the forefront of the study of aging. These issues are further impacted by such overarching concerns as availability/accessibility, coordination, adaptation, and information/communication/awareness as they relate to programs, policies and resources.⁹⁸ Table 2.1 provides a sample list of specific social gerontology issues that are of current concern, the vast majority of which impact and/or are impacted by community planning.

As discussed in the introductory chapter to this thesis, the study of seniors and community planning is becoming increasingly relevant with demographic and societal change. The discussion of social gerontology and list of “areas of concern in social gerontology” belies this important fact, namely: “the aging of the population has been called ‘the most important trend of

⁹³ Smith, 1993, 105 and Gilbert Smith, article in *Ageing and Society*, June 1989 as cited in Peace in Peace, 1990, 2.

⁹⁴ C. Estes, “The aging enterprise revisited,” *The Gerontologist*, 33 (3), 1993, 292-298 as cited in Phillipson, 1998, 13-14.

⁹⁵ H.R. Moody, “Gerontology and critical theory,” *The Gerontologist*, 32 (3), 1992, 294-295 as cited in Phillipson, 1998, 13-14.

⁹⁶ Phillipson, 1998, 13-14.

⁹⁷ See Greengross in Thursz, Nusberg and Prather, 1995, 205.

⁹⁸ East, 1992, 113-114.

Table 2.1 Areas of Concern in Social Gerontology

Accommodation

facility care
low-income accommodation
sheltered housing

Health Care

home nursing
family medicine
psychiatry/mental health
neurology
dental services
physiotherapy
podiatry
speech therapy
gerontology
social work
public health
palliative care
adult day care

Personal Development

educational services
recreational services
spiritual opportunities
ethnic and cultural groups
work for pay opportunities
volunteer opportunities

Community Services

homemakers
meal-on-wheels
support groups friendly visiting
outreach
volunteer assistance
handyman service
legal aid
seniors' counsellor
alcohol/drug counselling
financial assistance

Transportation

public transportation
custom transit
volunteer drivers

Planning Infrastructure

information and referral
participatory planning
advocacy groups
seniors' organizations
facts and figures
municipal planning
community services planning
service clubs
private sector planning

Source: Cooper, 1992, 17.

our time'; its implications for society are profound and far-reaching.⁹⁹ In our dollar- and time-stretched society, seniors tend to receive lower priority,¹⁰⁰ with the result that plans, services, and resources are not focused on seniors' needs and desires. Given the demographic certainty of

⁹⁹ Wood, 1992, 5.

greater numbers and proportions of seniors, this path becomes more dangerous every day. Social gerontology would do well to continue and expand on research in areas relevant to seniors' participation in community and decision making.

Social gerontology also provides an introduction to a discussion of ageism and exclusion, in contrast with seniors' empowerment, a discussion that is relevant here because the level and type of inclusion of older adults in community planning stems from society's attitudes towards older adults and old age, and the subsequent status and roles assigned to and accepted by older adults. For example, many seniors feel or are made to feel "roleless" (without a productive or positive role) within a society that views old age and the aging process as a problem. Some argue that there are three common views or attitudes on aging and the aged: that seniors are a "homogenous group with similar experiences", that seniors are "sick, isolated and miserable," or that seniors are "happy, complacent and trouble free."¹⁰¹ Obviously enough, it is these oversimplified and harmful generalizations of seniors that constitutes ageism, defined as "a process of systematic stereotyping of and discrimination against people because they are old, just as racism and sexism accomplish this with skin color and gender.... Ageism allows the younger generations to see older people as different from themselves; thus they subtly cease to identify with their elders as human beings."¹⁰² Subtler forms of ageism include a variety of assumptions or views, including:

- the premise of older adults as a controlled or controllable social group;

¹⁰⁰ Greengross in Thursz, Nusberg and Prather, 1995, 203.

¹⁰¹ F. Berghorn et al, *The Urban Elderly: A Study of Life Satisfaction*, New York, NY: Allanheld, Osmun and Co., 1978 as cited in Boehler, 1982, 20-21.

¹⁰² Robert Butler. *Why Survive?* New York, NY: Harper and Row, 1975, 12 as cited in Lowy, 1985, 73. See also B. Hughes and M. Mtzetuka, "Social Work and Older Women: Where Have Older Women Gone?" in M. Langan and L. Day, eds., *Women, Oppression and Social Work*, London: Routledge, 1992 as cited in Thompson, 1995, 5.

- equating all elderly with the least capable, least healthy, least alert, and most dependent among them;¹⁰³ and,
- the exclusion of older adults, their needs, and their community planning preferences due to patronizing and ageist attitudes on the part of community members, elected officials, and planners.

As with other forms of discrimination, ageism can and should be effectively combated. When ageism is regarded, not as a matter of personal prejudice, but as a form of oppression, we can recognize it as a structural problem and societal concern, and thereby actively challenge it in a much broader manner. However, we need to be aware that the challenge should not consist of simply labelling seniors as an oppressed group, as "the most significant implication is the need to recognize the danger of condoning, reinforcing, or exacerbating that oppression."¹⁰⁴ Seniors' empowerment offers an excellent answer to this challenge.

In regard to ageism and empowerment, one author notes the importance of, and past societal resistance to, seniors' empowerment:

Older people are one of the last groups with which the notion of empowerment has become associated. Yet the privilege it represents - the ability to make informed choices, exercise influence, continue to make contributions in a variety of settings, and take advantage of services - are critically important to the well-being of the elder. These are choices often taken for granted by working-age adults but they have eluded older persons for a variety of reasons, including poverty, poor health, low educational levels, lack of transportation and access to services, negative stereotypes about aging, and overt and subtle age discrimination."¹⁰⁵

¹⁰³ Last bullet only, see Richard A. Kalish, "The New Ageism and the Failure Models: A Polemic," *The Gerontologist*, 19(4), 1979, .398-402 as cited in Lowy, 1985, 75.

¹⁰⁴ Thompson, 1995, 6; and Thursz in Thursz, Nusberg and Prather, 1995, xi.

¹⁰⁵ Nusberg in Thursz, Nusberg and Prather, 1995, ix.

Unlike the empowerment approach, past approaches have often focused on powerlessness: "the lack of access to the resources, knowledge, and skills that are necessary to solve one's own problems, including the ability to participate effectively in social change."¹⁰⁶ For seniors, factors of powerlessness can be varied and extremely significant, including: weakening of traditional support systems, such as family and community ties; personal losses, such as physical decline (strength, stature, mobility, chronic conditions, and sensory decline) and mental decline (modest impairment of short-term memory, decrease in speed of learning, slowing of reaction time, some degree of mild forgetfulness); and, substantial life losses, such as socio-political losses (through retirement, age discrimination, role loss, dependency in an independence-oriented society, and the difficulty of asking for help).¹⁰⁷

Rather than focusing on powerlessness, empowerment focuses on the philosophical and practical actions needed to "establish new values that center on the inherent worth of the individual and reject those values which - for those without work, health, or status - undermine their ability to feel in control, with value, and appreciated."¹⁰⁸ What this means in practical terms is that seniors' empowerment involves removing barriers to seniors' participation in society, so that seniors can take advantage (and be encouraged to take advantage) of opportunities to act on their own behalf. Empowered seniors "need to assume full responsibility for their lives, remain in the mainstream of life, act in personally satisfying and socially responsible ways, contribute according to their resources, and receive what they need to retain their dignity and a legitimate

¹⁰⁶ See Cox and Parsons, 1993, 17, 18.

¹⁰⁷ Cox and Parsons, 1993, 20-26.

¹⁰⁸ Sykes in Thursz, Nusberg and Prather, 1995, 48; and Lowy, 1985, 75.

place in the family, neighbourhood, community, and nation.”¹⁰⁹ A United Nations working group emphatically links seniors’ empowerment with community planning:

“The concept of empowerment must be core to the planning of all human services, that is, older people must be a part of the initial and ongoing process of planning. Their priorities and preferences must be taken into consideration; this is necessary if the democratic principle is to include a large group of people, itself progressively growing in numbers, who become increasingly excluded as they get older.”¹¹⁰

In the preceding discussion of ageism, exclusion, and empowerment, it should be noted that other forms of oppression or systemic prejudice may be at work in seniors’ participation in community decision-making. This thesis does examine the prejudices potentially engendered when dealing with mobility difficulties, illnesses or other health concerns as well as mobility and income level. Further study should however be done on the issues of sexism and racism as regards to how they interplay with potential ageism in community participation.

IV. Planning for the Needs of an Aging Population

Community planning, in general, is designed to respond to the future lifestyle and service needs of a local population. In this sense, knowledge of and consideration for the characteristics and needs of that population is fundamental to the success of planning efforts.¹¹¹ Within planning, a planner therefore has a “professional responsibility to guide and help society adapt and meet the challenges of the future” and “to understand the nature of these changes and to aid in the

¹⁰⁹ Sykes in Thursz, Nusberg and Prather, 1995, 48.

¹¹⁰ UN Working Group on the Empowerment of Older Persons as cited in Greengross in Thursz, Nusberg and Prather, 1995, 206.

¹¹¹ See East, 1992, 37; Segalowitz, 1981, 15.

development of the policies which will meet these new needs.”¹¹² Given our current and future age demographics, this implies rather obviously that planners and planning must possess intimate knowledge of aging and related processes. For example, a planner must have an understanding of the average and particular abilities of the seniors in his or her community, in order to ensure that the environmental conditions that seniors must interact with do not exceed their various levels of competence.¹¹³ “The idea that aging occurs in contexts that in turn shape the aging experience then places a great responsibility on those who are concerned with planning environments. The environment can determine the quality of life people experience as they age.”¹¹⁴ In fact, the nature, characteristics, and evolution of a planned environment, that is, community effectiveness and responsiveness, dramatically impact the most basic quality of life for seniors. A truly successful community will enable all individuals, regardless of age, to fulfill their personal life needs, namely, the need to continue a meaningful life (in the face of death, loss, change, unpredictable futures, etc.), the need to express oneself, and “the need to exert influence in interaction with one’s physical and social environment.”¹¹⁵ All this said, it is important to note that there has been a small amount of research at the intersection of gerontology and planning, principally in the area of planning for the needs of an aging population.

On a practical level, the literature states that planning for an aging population requires planners to: work closely with various service providers and levels of government; educate the public about meeting seniors’ needs; acquire input from service providers and caregivers; plan in long-

¹¹² Segalowitz, 1981, 17.

¹¹³ Hodge, 1990, 8.

¹¹⁴ East, 1992, 40.

¹¹⁵ Berman-Rossi in Monk, 1990, 144.

term fashion with younger adults; and, directly involve seniors in planning.¹¹⁶ This might require creativity in implementing long-term aging-related priorities by promoting such opportunities as they arise, for example in large well-resourced development projects.

One of the most important factors in planning for an aging society centres around the integration of seniors' needs and perspectives with planning for a community in its entirety. Problems such as insufficient incomes or inadequate housing, which may disproportionately affect older adults, are concerns of the entire community.¹¹⁷ Holistic planning needs to address two very important and practical issues: aging in place (seniors remaining in their community longer) and effective spending (where satisfied community living is less costly to government than institutional care).¹¹⁸ Government recommendations in the area of planning for an aging society have included: "identify[ing] the particular needs of seniors locally, set[ting] local priorities, and assum[ing] operational responsibility wherever appropriate...; keep[ing] the needs of seniors in mind when exercising their regulatory as well as their spending authority...; [and] cooperat[ing] to the fullest extent possible with other levels of government and locally based institutions to maximize the use and benefit to seniors of resource available to the community."¹¹⁹ Academic authors contribute additional broader recommendations, such as: empowering seniors to define their own set of needs and solutions and encouraging older adults to become a part of the planning, servicing, and design process in order for strategies to conform to their needs.¹²⁰ It is this type of recommendation that highlights the importance of seniors' involvement in community planning.

¹¹⁶ Howe, Chapman and Baggett, 1994, 5-6.

¹¹⁷ .Ontario Ministry of Municipal Affairs and Housing, 1983, 1; and Stuenkel in Monk, 1990, 168

¹¹⁸ See Gosselin, 1984, 49.

¹¹⁹ British Columbia Task Force on Issues of Concern to Seniors, 1990, 12.

¹²⁰ East, 1992, 174.

V. Seniors' Participation in Community Planning

Through the previous discussions of public participation in community planning, social gerontology, and planning for the needs of an aging population, this chapter has presented a number of the key bases from which the present exploration of seniors participation in community planning begins. It should be apparent that seniors can and do become involved in local planning efforts. This section will therefore examine:

- why seniors' participation is worthwhile;
- why special outreach efforts to seniors might be warranted;
- what special factors influence seniors' participation; and,
- what role(s) a planner might play in seniors' participation.

1. Why is Seniors' Participation Worthwhile?

Seniors' participation, like the participation of other special population groups, is worthwhile on the grounds that users often have a great deal of knowledge and opinions on the community resources they use. As one author puts it, "seniors know what they need and know what they want and therefore must be an integral part of any strategy that proposes to create more suitable neighborhood environments for our aging population."¹²¹ Time and time again, seniors have demonstrated that they can indeed "articulate their concerns, collect data and act on the findings."¹²² And since seniors (as well as their service providers, caregivers, and families) are aware of the degree to and manners in which their environment affects their daily lives, and since they are able to provide this information (if barriers to participation are removed), it would

¹²¹ East, 1992, 168.

appear that this awareness and ability provide the basic justification for including seniors in public participation efforts. Besides, "the fact is that most older persons are like everybody else. They seek autonomy and participation in decision making."¹²³

However, there are additional, more specific, reasons for including seniors in public participation efforts. In the first instance, seniors tend to view their needs and their community differently than planners. That is, a senior may see the salient characteristics of a neighbourhood as determined by locations and availability of various 'lifelines,' such as affordable grocery stores, local church services, appropriate transportation, and the homes of friends and family, and hence view the placement and accessibility of certain planning functions as vitally important, rather than a matter of convenience.¹²⁴ In the second instance, seniors tend not to be a homogenous group, necessitating the inclusion of a broad range of seniors and seniors' interests in community planning efforts: in the words of the federal government "the development of policies and the implementation of programs responsive to the needs of this diverse group can best be achieved through continuing involvement of the aging themselves."¹²⁵ In the third instance, when seniors provide input on issues that are of concern to them, they tend to include the needs and perspectives of the entire community: having been a part of all previous age groups and having as part of their support network friends and family members of various ages, seniors can provide ideas and plans that benefit all those around them.¹²⁶ In the fourth instance, seniors' participation is worthwhile because participation (in the form of interpersonal and/or group activity) improves individual seniors' health, independence and well-being: participation can

¹²² BC Research, 1986, 6.

¹²³ Thursz in Thursz, Nusberg and Prather, 1995, xi

¹²⁴ Rowles and Ohta, 1983, 67-69, 81-82.

¹²⁵ Government of Canada, 1982, 143. See also Gosselin, 1984, 33.

¹²⁶ Government of Canada, 1982, 141.

result in “consciousness raising, increased visibility, vocalness and influence in the conduct of local affairs.”¹²⁷

In the final instance, seniors’ participation is important because, like the participation of other population groups, it has come to be recognized as a right (and responsibility) by a variety of organizations. From the international arena, the UN has declared that “older persons should remain integrated in society, participate actively in the formulation and implementation of policies that directly affect their well-being and share their knowledge and skills with younger generations.”¹²⁸ In the American arena, the National Association for the Advancement of Retired Persons calls on “governments, businesses and unions, educational institutions, non-governmental organizations, and other appropriate parties... to: ... provide the means through which individuals can influence decisions with major impact on their lives; provide adequate supports and structures to enable marginalized populations to improve their lives, exercise their rights and participate in the life of society.”¹²⁹ Finally, a key Canadian organization, the National Advisory Council on Aging advises, simply, that “Canada must guarantee the same rights and privileges to all its citizens, regardless of their age” and that “seniors must be involved in the development of policies and programs.”¹³⁰

¹²⁷ BC Research, 1986, 6. See also Fischer and Schaffer, 1993, 9-10.

¹²⁸ American Association of Retired Persons, <http://www.aarp.org/intl/prom.htm>.

¹²⁹ American Association of Retired Persons, <http://www.aarp.org/intl/prom.htm>.

¹³⁰ National Advisory Council on Aging, <http://www.hc-sc.gc.ca/seniors-aines/seniors/english/naca/naca.htm>.

2. Why Outreach to Seniors?

While it has been established above that the inclusion of seniors in public participation efforts is worthwhile, it does not follow that seniors ought to be given special treatment in these participation efforts. As a matter of fact, some of the literature indicates that seniors already participate in political life roughly commensurate with their preponderance in a community. For example, political activity (such as voting, signing petitions, and belonging to political groups) does not appear to decrease with age.¹³¹

However, this maintenance of interest in voting and political issues does not necessarily imply that seniors are proportionately or adequately involved in community planning efforts. In the first instance, voting, as planners would note, is not equivalent to active participation in community planning, and much is to be gained in the realm of effective planning through the use of participatory processes. In the second instance, although voting does not substantially decline in the 65-year-old group, it does decrease dramatically as individuals get into their eighties, as health concerns begin to create barriers to participation.¹³² In the third instance, the literature demonstrates that "older persons have not been successful in affecting policy," that is, "few avenues of influence are open to the elderly" not least of which because "group cohesiveness and age consciousness are necessary prerequisites to impact the political process," something many authors feel is missing from the older age cohorts.¹³³ Adding to these inequalities, age-based

¹³¹ See Atchley, 1991, 233; Gifford, 1990, 11,13; and James E. Curtis and Ronald D. Lambert, "Voting, Election Interest, and Age: National Findings for English and French Canadians," *Canadian Journal of Political Science*, 9, 1976, 293-307 as cited in Novak, 1997, 321.

¹³² Gifford, 1990, 13.

¹³³ Regnier in Woodruff and Birren, 1983, 359. See also Novak, 1997, 321-322.

advocacy associations compete for time and resources in the participation process with other (usually more established) advocacy groups.¹³⁴

Arguably, these factors combine to suggest that seniors may not be participating equally or equitably in community planning with other population groups. It has been also stated that at least some modest action is required: "the inability of older people to exercise adequate influence on social and environmental policies that affect the surrounding neighborhood means that planners and decision makers must take a more active role as advocates. This is particularly important when changes are contemplated that affect the interest and the well-being of the older person."¹³⁵ While planners ought perhaps to be advocating on behalf of the entire community and its interests, both advocacy for and actual participation by older adults will require some extra effort, namely, outreach to seniors. Outreach, in general, is "a method of attempting to: identify people who are in need of services and benefits; informing such people about service provisions and benefits; and supporting them in accessing resources that are available to meet their needs."¹³⁶ Outreach can involve such methods as: personal contact; contact through the media; field offices and drop-in centres; coordinating with existing organizations; creating displays in key locations; and, many other possibilities.¹³⁷

Beyond the possibility that seniors may lack equal or equitable involvement in public participation efforts, there are other more specific reasons for outreach to seniors. Firstly, it has been discussed above that seniors depend especially heavily on their environment for their

¹³⁴ McPherson, 1990, 240.

¹³⁵ Regnier in Woodruff and Birren, 1983, 359. See also City of Toronto Planning and Development Department, 1982, 6-7.

¹³⁶ Provincial Senior Citizens Advisory Council, 1989, 1.

¹³⁷ Jones, 1990, 16, 18; and Novak, 1997, 323-326.

health, independence, and general well-being, and hence should very actively participate in decisions regarding that environment. Active outreach to seniors in the planning process can break the "chicken and egg" cycle of environmental dependence: "older people cannot... participate fully or take an active role in their communities unless their environment is conducive to such a way of life"¹³⁸ and yet retaining or gaining a suitable environment requires participation in community decision making. Secondly, seniors, due to physical and mental changes, are more likely to be isolated than other members of the community, experiencing difficulties gaining access to not only the planning process but to the resources and services that are being planned.¹³⁹ "Loss of efficacy on the part of elders results less from loss of competence than from the power differential in the interaction between elderly people and the environmental systems with which they are involved. Health problems, loss of significant support systems, and forced disengagement from major social institutions often impose a limitation on elders' choices that results in decreased power to make decisions about their lives - and eventually in loss of control and disenfranchisement."¹⁴⁰ Thirdly, because of ageism and stereotyping, individual seniors may feel less competent than other age groups (especially those more accustomed to participatory planning methods), or they may feel politically powerless and apathetic (through failed or nonexistent past efforts to include seniors in participation efforts).¹⁴¹ Finally, as seniors tend to be most involved in community life roughly ten years on either side of "retirement" (a specific age sub-group of seniors) and because joiners tend to be healthy, wealthy, in a family unit, and with high levels of life satisfaction,¹⁴² specific outreach to include a wide variety of seniors is essential. One seniors' advisory council specifies some practical reasons why seniors'

¹³⁸ Gosselin, 1984, 52.

¹³⁹ Provincial Senior Citizens Advisory Council, 1989, 3.

¹⁴⁰ Cox and Parsons, 1993, 17-18.

¹⁴¹ A. Miller et al, "Age Consciousness and Political Mobilization of Older Americans," *The Gerontologist*, 20 (6), 1980, 691-700 as cited in McPherson, 1990, 240.

outreach is essential: lack of knowledge about available services; tendencies to wait until an issue develops into a crisis; lack of ability to reach services; and psychological barriers (such as shyness or apathy) that prevent access to services.

3. Factors Influencing Seniors' Participation

Although seniors are far from being a homogenous group, the process of aging brings with it a number of relatively constant or, at least usually relevant, factors. These factors impact significantly on seniors' effective ability to participate and are examined below, in addition to some suggestions from the literature on effective ways to communicate with seniors in a public participation setting.

There are specific controllable variables that help determine when seniors might be more likely to participate, namely when they:

- are looking for roles that will keep them involved in community life;
- feel accepted/have a place in community;
- are provided with a sense of fulfillment;
- are offered a safe chance to learn new things;
- are able to access the opportunities to participate
- feel they have a personal stake in a given issue; and,
- feel their views and actions will make a difference.¹⁴³

¹⁴² McPherson, 1990, 438.

¹⁴³ See Fernando Torres-Gill, "Political Involvement among Members of Minority Groups: Problems and Profits," in R.L. McNeely and John Colen, eds., *Aging and Minority Groups*. Beverley Hills, CA: Sage, 1983 in Lowy, 1985, 365. See also Howe, Chapman and Baggett, 1994, 43-46.

In any discussion of the factors that impact seniors participation, it is extremely important that two postulates remain front and centre: firstly, that seniors are not an easily-generalized population group (in that they are not a homogenous group) and secondly, that the factors at play here are not characteristics of older adults but rather factors in the process of aging. Given these two 'caveats,' the factors that significantly impact on seniors' participation in planning can be divided into physiological and mental/psycho-social factors. The link between the factors in both categories is that aging results in an increase in the number and degree of irreversible changes and permanent losses in our lives, resulting in increased dependencies and stresses.¹⁴⁴

There a variety of ways to categorize the physiological changes brought about through aging. However, the most relevant categorization for the purpose of this thesis is one which speaks directly to the impact of aging-related physiological changes on the ability to participate in community planning efforts. These changes are summarized in the table below, as aging-related changes correlated with specific impacts on participation in planning.

¹⁴⁴ Boehler, 1982, 5; and M. Blenker, "The normal dependencies of aging," in R.A. Kalish, ed., *The Later Years: Social Applications of Gerontology*. Monterey, CA: Brooks/Cole, 1969 in Berman-Rossi in Monk, 1990, 142; and Senior Citizen's Bureau, 1981, II.3.20.

Table 2.2 Aging-Related Changes and Their Effect on Participation¹⁴⁵

Aging Factor	Effect
Sensory loss or changes	<ul style="list-style-type: none"> • poorer vision especially for details, need for higher illumination and contrast and reduced glare • night vision worsens • hearing loss (including problems with background noise) resulting in misunderstandings and withdrawal • changes in tactile and temperature sensitivity increase possibility of discomfort with environment • lowered ability to speak clearly
Other physiological changes	<ul style="list-style-type: none"> • increase in mobility difficulties • chronic pain or other chronic health conditions decrease stamina and lead to general discomfort • bone and muscle conditions increase danger of accidental falls
Perceptual processes and Psychomotor Performance	<ul style="list-style-type: none"> • decreased ability to come to closure on instantaneous decisions • slower reaction times and decreased physical accuracy
Mental Functioning	<ul style="list-style-type: none"> • decline in learning performance • decline in short-term, recent, remote and old memory • decreased ability to multi-task and problem solve • decline in creative effort
Emotional Capacity	<ul style="list-style-type: none"> • declining drive and motivation • constant ability to feel and express various emotions

Source: Alberta Senior Citizens Bureau, 1981, II.4.25 - II.4.27; Atchley, 1991, 82-100; Dreher, 1987, 22-33; Carmichael, Botan and Hawkins, 1988, 31-55; and Howe, Chapman and Baggett, 1994, 9-11.

¹⁴⁵ For a more detailed discussion of age-related changes and related effects, see also Thompson, 1995; Nussbaum and Coupland, 1995; and Lubinski and Higginbotham, 1997.

As suggested above, as individuals age they experience, in addition to many physiological changes, changes in the mental and psycho-social arena, including loss of roles, status, and family/friends as well as the process of facing death.¹⁴⁶ Despite the negative impact of these losses, there are also number of motivating factors in the mental/psycho-social realm that would encourage an older adult to become involved in public participation processes, such as:

- wanting to help and be useful;
- ideological motivations to work on specific issues or for specific causes;
- diverse emotional needs such as avoiding feelings of guilt, wanting approval, wanting to cope with anxiety, etc.;
- tangible perks and other privileges;
- status/reward motivations;
- social relationship motivations (making new friends and socializing);
- to fill leisure time; and,
- to learn and grow personally.¹⁴⁷

In deciding daily activities, older individuals tend towards multiple motivations and a cost-benefit calculus, that is, a weighing of costs (such as time, inconvenience, and hazards) versus benefits (such as status, praise, and other rewards).¹⁴⁸ Such costs impact on seniors' participation, including: increase in the present aspects of life adding to ambivalence about involvement; nearness of death making remaining time precious; lack of experience with new

¹⁴⁶ Sheldon Tobin, "Basic Needs of All Older People," *Planning Welfare Services for Older People*. New York, NY: Public Welfare Association of New York, 1965, 5 as cited in Lowy, 1985, 140.

¹⁴⁷ Fischer and Schaffer, 1993, 43-48.

¹⁴⁸ Fischer and Schaffer, 1993, 51.

approaches making participation seem frightening; and, increased frailty resulting in increased risk and possibility of failure.¹⁴⁹

As a result of research on these motivations for, and aging-related impediments to, seniors' participation in community planning and other activities, the literature also provides guidelines, standards and recommendations for methods of communicating with, generally, the public and, specifically, older adults.

In the first instance, the literature lays out some suggested guidelines for running effective community meetings for all age groups, guidelines which (although sometimes modified) must form the basis of any approach to public involvement through group meetings, regardless of the age group targeted. The following elements contribute towards an effective community meeting: properly defined agenda, good publicity, ongoing audience analysis, suitable and accessible physical arrangements, and established key roles (e.g., convener, facilitator, recorder).¹⁵⁰ The literature is filled with basic principles and constructive suggestions on meetings for community participation in planning, such as the following basic qualities: "commonly understood goals; a clear process for reaching those goals; an awareness that people come with their personal preoccupations and feelings as well as an interest in the subject at hand; and a sense of involvement in making decisions and the actions following, which means that all members should participate."¹⁵¹ One author refines these into ten key principles:

1. "Bring people together who would not normally come together otherwise.
2. Provide a comfortable setting in which to express ideas and attitudes.

¹⁴⁹ Berman-Rossi in Monk, 1990, 152.

¹⁵⁰ Jones, 1990, 28-32.

¹⁵¹ Sarkissian and Perlmut, 1994, 72.

3. Help to clear up misunderstandings.
4. Establish many new informal channels of communication among participants.
5. Provide more information and insights than are available through survey methods.
6. Stimulate follow-up action growing out of real needs.
7. Pave the way for co-operative action.
8. Enable participants to understand more fully the objectives, boundaries and problems of other organisations.
9. Rewarding to the individual participants.
10. Produce an unusually good setting for creative thinking.”¹⁵²

Another author concludes: “good meetings are ones where people leave feeling satisfied and look forward to the next one, where people who needed to be there were there and even arrived on time, where everyone stayed until the end, where clear-cut decisions were made, where feelings could be aired, and where conflict was dealt with rather than avoided without the group self-destructing, and where participants felt rewarded for their contributions.”¹⁵³

These basic principles of public involvement through group meetings must be further refined for gatherings specifically aimed at older adults. The majority of guidelines must be premised on two levels of understanding: a basic, factual grasp of the age-related change and an empathy regarding the personal implications of the change. From the generalized characteristics of the aging process and their associated impacts on communication, interaction, and participation a variety of sources from the literature have devised principles for including seniors in the

¹⁵² W.W. Burke and R. Beckhard, eds., *Conference Planning, Second Edition*. La Jolla, CA; University Associates, 1976 as cited in Sarkissian and Perlmut, 1994, 73.

¹⁵³ Jones, 1990, 27.

community planning process. One author describes key elements in creating an atmosphere that supports seniors' efforts to communicate:

- "Use descriptive rather than evaluative speech.
- Using a problem-solving approach rather than maintaining control can facilitate more equal give-and-take as well as participation. ... If an approach of 'Let's sit down and see what we can come up with' is used, a contract is possible, one in which goals and priorities are established together. Decisions then can be made and implemented.
- A spontaneous atmosphere with freedom to express feelings, needs, and ideas promotes more interaction than when there have been closely planned strategies to control a meeting.
- Empathy, the ability to put oneself in another's position and feel what another is experiencing, communicates an attitude of understanding and desire to communicate. Asking for feedback to better understand the interests, goals, direction, and feeling of the receiver facilitates two-way communication and contribution. Contrariwise, an attitude of neutrality, often hidden behind objectivity, may communicate a lack of concern and involvement.
- Projecting an attitude of equality versus one of superiority is usually more facilitative. ... Planning and working collaboratively and cooperatively promotes mutual respect and opportunities for more input and flexibility in further contributions.
- A provisional 'Let's give it a try -- it's not etched in concrete' approach is more conducive to ongoing communication than an attitude of certainty: 'There's only one right way to do this.' A temporary solution is usually more acceptable."¹⁵⁴

¹⁵⁴ Deichman and Kociecki, 1989, 33-34.

These principles will form the basis of an evaluation of the seniors' outreach process used in the two cases, as elaborated in the chapter on thesis findings.

4. The Planner's Role in Seniors' Participation

The sections above have more than hinted at the role or roles required of planners in effectively including seniors in local community planning efforts and the public participation processes that accompany them. The planner's role, truly, consists of two major requirements: the ability to effectively design and implement participation processes, and a practical knowledge of the process of aging and of the needs and perspectives of seniors in the community. At the intersection of the two is the translation of gerontological knowledge into practical methodology for including seniors. One author makes the following specific recommendation:

Local governments must assess how well their planners understand the diversity of the existing older population, then introduce an improvement strategy that adopts a number of different approaches: (1) encourage enrolment in gerontology courses and a review of the existing literature; (2) work more closely with seniors advocates and community organizations; (3) look beyond the current Census and provincial data for unique local information by conducting case study interviews, focus groups, and by hiring seniors as field researchers; (4) develop a planning feedback network through seniors centres, noon-lunch programs and other neighbourhood services that records and formally responds to the claims and complaints made by seniors. The final approach is a commitment by planning staff and politicians to extending personal experience through socializing and talking to seniors in the community.¹⁵⁵

In other words, planners must advocate for the inclusion of seniors, seniors' issues, and seniors' perspectives in the planning process.

¹⁵⁵ McClain, 1991, 28.

VI. Conclusion

This chapter has provided the reader with an overview of past and current literature relating to seniors' participation in planning. An examination of the larger context explained the relevance of population aging as well as the structural environment of seniors' participation, namely the increased complexity of policy making and changing government responsibility for seniors' issues. Possible definitions and relevant history of public participation in planning were presented as well as goals, purposes, reasons, approaches, and methods of participation. Local government structure, public expectations, representativity, and the evaluation of success have all provided problems for public participation, problems which have further complicated the planner's role in promoting and implementing effective participation mechanisms. Social gerontology, for its part, has acknowledged the importance and relevance of multidisciplinary in researching aging and the older adult and, more recently, has presented seniors' empowerment as an alternative model to exclusion and ageism.

At the intersection of the two fields of public participation and social gerontology, there has been a true paucity of integrated research, though the notion of planning for an aging society has gained some ground in both disciplines. What the literature has however managed to provide is some tentative answers to questions about seniors' involvement in planning, such as: why is seniors' participation worthwhile? why might special outreach efforts to seniors be warranted? what special factors could influence seniors' participation? and, what role(s) might a planner play in seniors' participation? This literature review has provided a background for what follows, namely the evaluation of a seniors' outreach process used in two cases of local community planning.

Chapter 3: Introduction to the Cases

To test the potential of focus groups as a method of engaging seniors in community planning, I evaluated and analyzed two cases of seniors' focus groups (which I facilitated), then reported on them using thematic analysis, in my capacity as a student intern for the District of North Vancouver Social Planning Department. The two cases related to the Lynn Valley Official Community Plan and the Seymour Local Plan. This chapter introduces the two cases as well as the nature of the focus groups and thematic analysis used (and the facilitator skills required to implement them); the following chapters evaluate the effectiveness of the focus groups and analyze the factors influencing their effectiveness.

By way of introduction, it should be said that the District appeared to be a responsive environment for seniors' participation in community planning. A recent municipal document covering neighbourhood planning policies stated that "the District will recognize and encourage resident involvement in neighbourhoods at all levels - from individuals or single-issues groups, to ratepayer/resident associations and other neighbourhood based groups.... The District will use public participation processes developed in collaboration with the community to encourage and support neighbourhood based solutions to local problems."¹⁵⁶ The District also directly lays out its own guidelines for public participation in a substantial document entitled "Public Involvement: Policies, Principles, and Practices," guidelines which are used, in part, to assess the effectiveness of the seniors' outreach process used in the two cases.

It is important to note the special characteristics seniors (as a population group) possess, that can influence the effectiveness or even validity of focus group processes. These influences include:

- dissuasion by institutional or family gatekeepers (care givers who are unwilling to allow planners access the senior(s) in their care);
- dissuasion by community leader (disapproval or lack of interest in the study may induce similar attitudes in seniors in the community);
- participation by the lonely or socially isolated (conditions more prevalent in the seniors' population group than some others) may result in a skewed sample of seniors;
- samples can also be skewed by the over-representative participation of the normally active segment of the seniors population (leaving many more isolated seniors out);
- snowball sampling (either conscious or unconscious) may result in the over-representation of a particular class or subgroup of seniors;
- defining the seniors population (outside of institutions) in any but the most general way may be difficult (no record of individual seniors residences or daily life patterns); and,
- weighting the importance of process results from seniors living in institutions (a very special situation with special needs and resources) versus those living outside of institutions may be objectively impossible.¹⁵⁷

These factors all contribute to the complexity of outreaching to seniors. However, with some of the special techniques mentioned later in this thesis, seniors can be effectively, efficiently, and appropriately involved in public participation efforts.

¹⁵⁶ Corporation of the District of North Vancouver, 1994, ii, iii.

¹⁵⁷ See Carp, 1989, 107-109, 113; Fennel in Peace, 1990, 62, 67; McAuley, 1987, 139, 142.

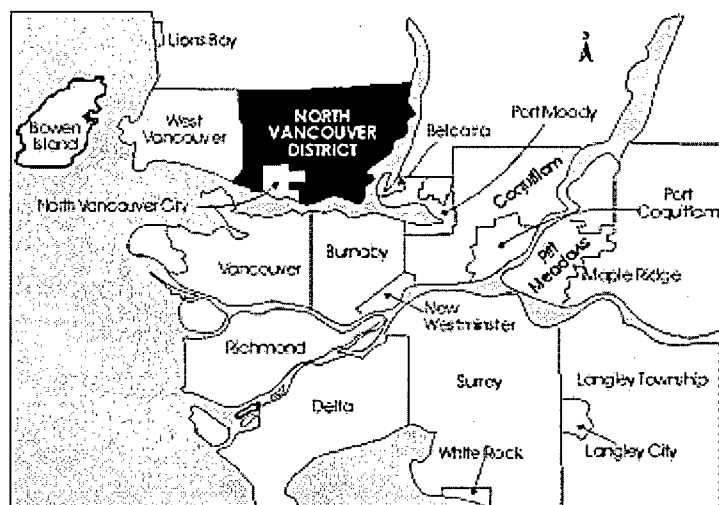
I. Case No. 1: “Seniors and the Lynn Valley Plan”

The community of Lynn Valley is located at the geographic centre of the District of North Vancouver, British Columbia (see Figures 3.1 and 3.2). It has its origins in local logging operations of the late nineteenth century and by the beginning of the twentieth century was a reasonably established community, complete with school, stores, churches, a community hall, and a variety of homes. The community is presently home to over 22,000 residents with a slightly less-than-average household income level (in comparison with the rest of the District).¹⁵⁸ The community has a central core, a large level area containing a shopping mall, businesses, a library, recreation centres, low-rise apartment and condominium buildings, and more. The rest of the community extends up the mountainside and down nearly to Burrard Inlet, with the result that most of the community is built on moderate to severe inclines.

In 1995, Lynn Valley residents began a new process of community planning. In the first phase, the District planning department asked residents to engage in an exercise whereby, based on a survey of community values, they were to envision what Lynn Valley would and should look like in the year 2025, roughly 30 years into the future. On the basis of this long-range vision (see Figure 3.3), the Community Planning Team spent nearly two years drawing up a set of objectives and policies to guide growth and development in Lynn Valley for the next ten years. This document, created by a diverse and representative team of Lynn Valley residents and other interested and affected parties, forms the Lynn Valley Plan. In June 1997, this plan was presented in a draft version to the community: a two week display at Lynn Valley Centre and an

¹⁵⁸ Corporation of the District of North Vancouver, <http://www.dnv.org/article.asp?a=142&c=167>.

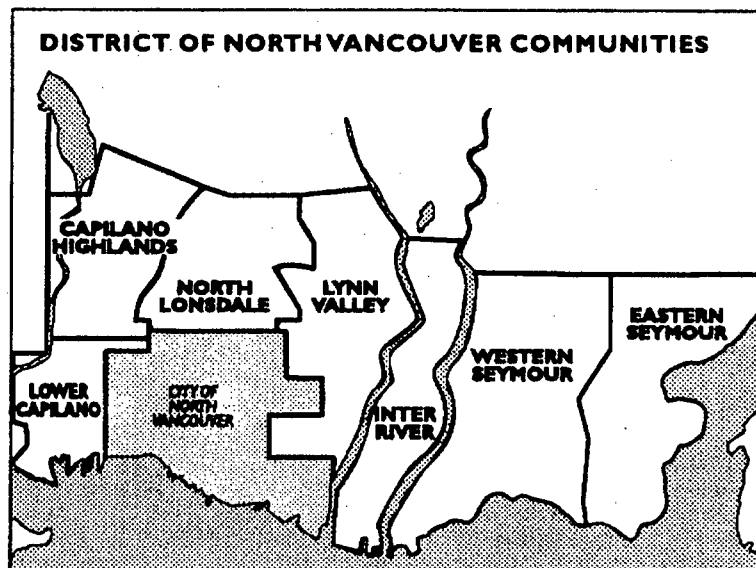
Figure 3.1 Map of Greater Vancouver, British Columbia



Source: Corporation of the District of North Vancouver,

<http://www.dnv.org/article.asp?a=142&c=167>.

Figure 3.2 Map of Lynn Valley and Seymour, District of North Vancouver



Source: Corporation of the District of North Vancouver, 1995, 9.

even longer presentation period at the District Hall encouraged residents to learn about the plan and provide feedback, both verbally to display staff and by means of a questionnaire. In the Fall of 1997, the Community Planning Team integrated that feedback into the plan; Spring of 1998 saw Council's unanimous approval of the plan.

Figure 3.3 Lynn Valley Vision Statement

“Drawing on our spectacular natural forest and mountain setting and our pioneer roots, we will create a diverse community which combines the warmth of small town living with the convenience of city life. Distinct, livable neighbourhoods will surround and be linked to a vibrant attractive town centre which will include residential, commercial and mixed use buildings. With a keen sense of community identity and pride, our active, involved citizens welcome people from all walks of life supporting them through life's transitions, working in partnership to provide lifelong learning and recreation.”

Source: Lynn Valley Official Community Plan, District of North Vancouver, 1997.

Concurrently with this community planning process, seniors and seniors' service providers in Lynn Valley came together to provide input into the Lynn Valley Plan on seniors' needs and concerns, and then, as a committee, to explore, develop, and coordinate services to enhance the health and well-being of Lynn Valley seniors. Early in 1996, “Supporting Healthy Seniors in Lynn Valley” discussion groups, as well as a large working luncheon, were held to gather information about seniors' issues in Lynn Valley, such as housing, social and recreational activities, health, transportation, and pedestrian safety. The focus groups (and luncheon) were composed of tenants living in seniors' apartment complexes, members of existing seniors groups, and other interested seniors. The feedback from these sessions formed an important source of information for the Community Planning Team and its efforts in drafting the plan.

Given the importance and usefulness of the initial input into the plan (derived by means of the initial seniors' focus groups and working luncheon), it was felt that a second set of discussion groups, entitled "Seniors and the Lynn Valley Plan," would be an asset to the public review stage of the draft version of the plan. Each "Seniors and the Lynn Valley Plan" focus group included a description of the plan as it relates to seniors' needs and concerns as well as a substantial amount of time for discussion of these issues and their treatment in the Plan. Each group, after an introductory presentation on the plan and its history, was presented with the details of how the Plan impacts seniors as regards housing, community services, transportation, pedestrian mobility, and parks and green space. Following each brief (2 to 3 minute) issue-related presentation, the group was encouraged to express their opinion on how well the plan incorporated seniors' concerns: whether the plan accurately represented those concerns, whether and how it could be improved in specific instances, and whether it had excluded or omitted certain concerns. Each workshop concluded with a request to fill out an evaluation form on the utility and effectiveness of the focus group.

In all, eight discussion groups were organized, from June 11 to July 8, 1997, one of which was cancelled due to lack of attendance (see Table 3.1 below). 76 seniors were in attendance, with group size ranging from 4 to 18. Volunteer recorders were indispensable in noting down the comments and suggestions of participants.

Table 3.1 Seniors and the Lynn Valley Plan Focus Groups

Group	Date	Time	Number of Participants
Lynn Valley United Church	Wed June 11, 1997	10:30 am - 12:00 pm	4
Kiwanis Lynn Manor	Wed June 11, 1997	1:30 pm - 3:00 pm	9
St. Stephen's Church	Fri June 20, 1997	1:30 pm - 3:00 pm	9
Silver Harbour Centre	Wed June 25, 1997	1:30 pm - 3:00 pm	10
Lynn Valley Library	Thurs June 26, 1997	10:00 am - 12:00 pm	9
Lynn Valley Shopping Centre	Thurs June 26, 1997	2:00 pm - 3:30 pm	cancelled
Silver Lynn Apartments	Wed July 2, 1997	2:00 pm - 3:30 pm	17
Draycott Gardens Apartments	Tues July 8, 1997	1:30 pm - 3:00 pm	18
Kirkstone Gardens Apartments	Organisation approached but no discussion group resulted.		
Legion Branch 114	Organisation approached but no discussion group resulted.		
St. Clement's Church	Organisation approached but no discussion group resulted.		

In organizing the groups, two approaches were used. In the first instance, community organizations, including many who participated in the first set of "Supporting Healthy Seniors in Lynn Valley" discussion groups, were contacted with the request to sponsor a seniors' focus group and actively recruit seniors to attend it. Secondly, sign-up sheets for seniors interested in attending a focus group was provided at two displays: the Seniors' Information Table on a monthly seniors' day (June 2) and the Lynn Valley Plan display (June 7 to June 22), both at the Lynn Valley Shopping Centre. The 41 seniors on these sheets were contacted and invited to attend one of two very accessible discussion groups, at the Lynn Valley Library or at the Lynn Valley Shopping Centre. In all instances, seniors received in advance an informational handout on how the Lynn Valley Plan might impact on seniors and seniors issues (see Figure 3.4). Upon completion of the focus groups, a short and long summary of the findings (proceedings of discussion on specific issues of interest to seniors in Lynn Valley – see Figure 3.5) was sent to participants and sponsoring organizations.

Figure 3.4 Seniors and the Lynn Valley Plan: Handout Provided Before Focus Groups

Seniors and the Lynn Valley Plan

Since 1995, Lynn Valley residents and the Community Planning Team have worked to produce a community Plan for Lynn Valley. At the outset, the Seniors' Planning for Lynn Valley Steering Committee was created to provide input on seniors' issues for that plan, but also to explore, develop, and coordinate services which enhance the health and well-being of Lynn Valley Seniors. As the draft Plan is now ready for the public to review, Seniors' Planning for Lynn Valley would like to ensure that local seniors have the opportunity to give their own feedback on the plan. As such, we are organizing a number of Seniors' Discussion Groups for Feedback on the Lynn Valley Plan, from mid June to early July, and *we would like you to take part!*

The Lynn Valley Plan sets out a long-range 30 year vision for our community and acts like a blueprint for the short-term future development of the Lynn Valley area. *The plan covers in detail a number of issues of interest to seniors, such as:*

Housing

affordable rental housing
more seniors' housing and seniors'
supportive housing
adaptable building design

Parks and Green Space

Lynn Valley forest preservation
flat, paved, lit trails
more benches and rest spots

Transportation

a central transit hub
accessible and protected bus stops
mini-bus service

Pedestrian Mobility

convenient, safe, and attractive pedestrian
walkways
major sidewalk and crosswalk improvements
adequate street lighting
more resting places
regular safety audits and Crime Prevention
Through Environmental Design

Community Services

Lynn Valley Seniors' Activity Centre
expansion of North Shore Private Hospital and
Lodge
increased arts and cultural activities

The Lynn Valley Plan be will be on display in the Lynn Valley Shopping Centre from Saturday June 7th to Sunday June 22nd. Representatives from the District of North Vancouver will be on hand to explain the Plan and answer any questions you might have. Drop in and find out more. Your views are important!

If you would like to participate in a seniors' discussion group, please call Annwen Rowe-Evans,
Social Planning Department, District of North Vancouver, at xxx-xxxx.

We look forward to hearing from you!

Figure 3.5 Short Summary of the Seniors and the Lynn Valley Plan Results

Seniors and the Lynn Valley Plan Summary of Project Results
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**Prepared by Annwen Rowe-Evans
July 30, 1997**

As part of public input for the Lynn Valley Official Community Plan, a series of seniors discussion groups were held to ensure that the opinions and ideas of older adults were represented in the Plan. A total of 8 Forums were held during June and July of 1997, with 76 seniors participating. The findings from the Forums are presented below.

Housing

- Develop more affordable housing and retain or replace ground oriented and rental units, especially for first time buyers, families with children and seniors.
- Allow a limited number of small scale (12 to 15 units) seniors developments on sites located on transit routes in the Long Term Single Family areas
- Mixed use (apartments over commercial) and residential developments in the town centre will increase
- The District, in consultation with seniors groups, as well as the development and disabled communities, will develop and promote the use of voluntary Adaptable Building Design and Universal Access Guidelines to enable new construction to more easily meet a broader range of needs of persons with disabilities or by seniors.
- Upon the initiative of residents, the plan allows individual neighbourhoods to determine through a survey if secondary suites, backyard cottages or granny flats will be permitted and under what conditions. This process of single family infill will be called the Neighbourhood Housing Program.

Community Services

- An expanded library will be built and a new Community Services Centre, potentially immediately adjacent to the library and on a proposed civic square, is recommended.
- A Lynn Valley Seniors' Activity Centre, perhaps temporarily housed at Kiwanis Lynn Manor, is supported. The plan requests that the North Shore Health Board, North Van recreation Commission, Keep Well, the Library and other service providers investigate the feasibility of providing health, social, recreational, and meal services.
- The use of local community resources will be optimized through joint partnerships with seniors governments, the private sector and non-profit agencies, including increasing accessibility and information sharing
- Expansion of North Shore Private Hospital will be supported, with community involvement in the process of facility improvements.
- It is proposed that Argyle Secondary School be expanded to include a Community Performance Theatre for both community and school use.
- An Art Gallery or other community use will be encouraged at the historic Nye House

Transportation

- A central transit hub will become a priority, with the Town Centre as the Focus of integrated and efficient public transit activity. BC Transit will be requested to improve connections between the Town Centre and the rest of the North Shore. This may include using the Mall site for transit stops and may include mini-bus services within the community.
- More protected waiting areas for bus passengers will be provided within the Town Centre and all bus stops will be accessible to wheelchairs, scooters and walkers.

Pedestrian Mobility

- Pedestrian circulation will be improved by providing safe, convenient and attractive pedestrian connections within the Town Centre and improved linkages to the surrounding neighbourhoods
- Funding for major sidewalk and road improvements in Central Lynn Valley will be pursued.
- Improvements to sidewalks and crosswalks on Lynn Valley Road, Mountain Highway, and East 27th will be made a priority, with attention to access for people with disabilities.
- In order to improve safety and security in our community, better street lighting will be encouraged.
- The District will work with local seniors' groups and the North Shore Disability Resource Centre in order to identify pedestrian deficiencies in the Town Centre.
- More resting places and better weather protection for pedestrians will be provided.
- Regular safety audits and Crime Prevention Through Environmental Design will be pursued.

Parks and Green Space

- Lynn Valley will retain its forested character, through protection and preservation of natural areas, recreation and public education.
- Parkland will be developed to provide a balanced range of active and passive recreation opportunities and amenities, taking into account the recreational needs of seniors, for example:
 - some flat and looped trails will be developed,
 - horseshoe pitches, lawn bowling greens and putting greens may be provided,
 - more benches and lighting on trails will be included.

II. Case No. 2: “Seymour Local Plan Seniors’ Forums”

The community of Seymour is located in the eastern third of the District of North Vancouver, BC (see Figure 3.2 above). Logging aside, it developed later than Lynn Valley’s, with the bulk of development occurring since the 1970s, except for an early community of summer homes in Deep Cove. Development of a commercial and community core has been reasonably recent, with a shopping and community core (Parkgate) constructed in the last few decades. In area, Seymour is several times the size of Lynn Valley however its population is roughly half, about 12,000 residents.¹⁵⁹ In addition, the average household income is slightly higher than that of the District as a whole.

In October 1997, the Council of the District of North Vancouver endorsed a resident-driven planning process for the Seymour area: the Seymour Local Plan. This process incorporated a variety of opportunities for public input, including seven Public Input Committees in the area of: transportation and traffic; growth and development; economic development; arts, culture and heritage; community services; housing and schools; and, parks, wilderness and environment. In addition to these issue-based committees, the District Community Planning Department and Seymour Local Plan Management Committee felt it important to cover several population groups that may not have been adequately represented in public input efforts: these included youth, the business community, and seniors. Such factors as late evening meetings, perceived political nature of the process, depth of commitment required to participate in committee work, and so on, were seen as adversely influencing seniors’ participation in local planning processes and hence a separate outreach project was initiated.

¹⁵⁹ Corporation of the District of North Vancouver, <http://www.dnv.org/article.asp?a=142&c=167>.

To achieve the goal of including seniors' issues and opinions in the Seymour Local Plan, a series of Seniors' Forums were planned and implemented. At the completion of the forums, a Seniors' Coordinator for Seymour Community Services Society represented and advocated for the findings of the Seniors' Forums at Community Coordinating Committee meetings, comprised of residents interested in spearheading the planning process. The format of each seniors' forum was designed, firstly, to explain the Seymour Local Plan process in an easy-to-understand fashion, in addition to addressing the rationale for the Seniors' Forums. Each forum then proceeded to discussion that elicited opinions on a series of issues of interest to local seniors and relevant to the plan, in the areas of housing, getting around, and community services (see Figure 3.6 for the forum format and questions asked).

To begin the series of forums, initial meetings were held between the researcher, District planning staff, a Seymour Local Plan Management Committee representative (the executive committee in charge of the Community Coordinating Committee) and a local seniors' advocate to devise the dates and times, locations, publicity, and format of the forums. As a result, the following seniors' forums were held, with a total of 50 seniors and 10 service providers participating (see Table 3.2).

Figure 3.6 Seymour Local Plan Seniors' Forums: Forum Format and Questions Asked

1.	Welcome	Welcome to the Seymour Local Plan Seniors' Forum <ul style="list-style-type: none"> • Introductions • Meeting format explained
2.	Background	What is a plan? <ul style="list-style-type: none"> • What is the Seymour Local Plan? • Why are there Seniors' Forums?
3.	Discussion	Housing <ul style="list-style-type: none"> • What makes/would make it possible for you to stay in your present home as long as possible? • What changes in your life would make it difficult for you to stay there? • Are there enough housing options for seniors in Seymour (enough supportive housing and services, too)? • Anything else to add about housing?
		Getting Around <ul style="list-style-type: none"> • Who uses what kind of transport (show of hands for car, bus, walking)? • Are you happy with public transit (consider likes, dislikes and suggestions to improve: routes, travel time, schedules, transferring, shelter, special services like HandyDART and minibuses)? • Are you happy with walking in and around Seymour (consider likes, dislikes and suggestions to improve both trail walking and sidewalks, intersections, resting places)? • Anything else to add about getting around?
		Community Services <ul style="list-style-type: none"> • Are the recreational programs you want to participate in affordable, accessible attractive, and appropriate (consider Ron Andrews, Parkgate, locally offered activities, etc.)? • Are you happy with senior-specific programs? • Are plays, movies and music concerts affordable, accessible, attractive, and appropriate? • Are other services like fire, police and ambulance the way you'd like them? • Are you able to do the volunteering that you'd like to (is it affordable, accessible, attractive, and appropriate)? • Anything else to add about community services?
4.	Wrap-up	<ul style="list-style-type: none"> • To summarize discussion, each participant expresses what they value and appreciate about Seymour (with option to "pass" if don't feel comfortable).
5.	Evaluation	<ul style="list-style-type: none"> • Request to fill out an evaluation form to tell us what was useful about this forum and what we can improve upon.

Table 3.2 Seymour Local Plan Seniors' Forums

Date	Time	Location	No. of Participants	Intended Participants
Mon Oct 5, 98	2:00pm-3:30pm	Lions Manor, Deep Cove	5	Lions Manor residents and other Deep Cove seniors
Wed Oct 7, 98	10:30am-12:00pm	Mt. Seymour Youth Centre	6	Seniors throughout Seymour
Tues Oct 13, 98	10:30am-12:00pm	Mt. Seymour United Church	26	Seniors throughout Seymour
Wed Oct 14, 98	3:00pm-4:30pm	Kiwanis Care Centre	13	Kiwanis Care Centre residents
Thurs Oct 15, 98	2:00pm-4:00pm	District Hall	10	Agencies serving seniors

In order to publicize the forums, flyers were distributed at seniors' apartment complexes, posters were put up at local shops and community spaces, announcements were made at seniors' programs, signs were placed on Mt. Seymour Parkway and Dollarton Highway, advertisements and articles were placed in the local press, and personal invitations were issued. Many of these efforts drew on existing seniors' networks, such as seniors' programs and meeting places. All publicity included both a general invitation to the seniors' forums and also a background document explaining the Seymour Local Plan and associated seniors' forums (see Figure 3.7 for the Sample Background Document). Following completion of the forums, a short or long summary of the discussions was sent to participants and sponsoring organizations (see Figure 3.8 for the short Summary of Forum Results).

Figure 3.7 Seymour Local Plan Senior' Forums: Sample Background Document

Seniors' Forums and the Seymour Local Plan

What is a Local Area Plan?

A Local Area Plan is a statement of the collective vision of a community. It lays out objectives, policies and implementation strategies for land use and services, covering social, environmental and economic concerns. It directs the growth of a community over the next decade.

What is the Seymour Local Plan?

In 1997, Council endorsed a resident-driven planning process for the Seymour area. Since then, seven public input committees have been gathering information and generating ideas on the following topics, for inclusion in the Seymour Local Plan: transportation and traffic; growth and development; economic development; arts, culture and heritage; community services; housing and schools; and, parks, wilderness and environment. A Seymour Local Plan open house was held in the spring at Parkgate Library to present these ideas and get public feedback.

What is a Seniors' Forum?

The Seymour Local Plan wants to make sure that there are plenty of opportunities for people to get involved in the planning process. Although we are trying very hard to include all residents in planning, we recognize that some groups don't always participate. Because of this, special sessions are planned for youth, the business community and seniors. The Seymour Local Plan is an important opportunity to help define *your* community. We are organizing a number of Seniors' Forums this October and *we would like you to take part!*

At a Seniors' Forum, we'll discuss a number of issues that are important to you and other local seniors and that will be covered by the Seymour Local Plan. They include:

Housing and Growth

affordable rental housing
supportive seniors' housing

Getting Around

private cars and public transit
pedestrian mobility

Community Services

seniors' services
arts and culture
recreational opportunities
wilderness preservation

Next Seniors' Forums:
date time location

Don't miss out on this great opportunity to get involved in a Seniors' Forum.
Hope to see you there!

If you would like more information or need a ride to the Forum,
please call the Seymour Local Plan Info-Line at xxx-xxxx.

Figure 3.8 Short Summary of the Seymour Local Plan Seniors' Forums Results

Seymour Local Plan Seniors' Forums Summary of Project Results
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**Prepared by Annwen Rowe-Evans
October 19th, 1998**

As part of public input for the Seymour Local Plan, Seniors' Forums were held to ensure that the opinions and ideas of older adults were represented in the Plan. A total of 5 Forums were held during October of 1998, with 50 seniors and 10 service providers participating. The findings from the Forums are presented below.

Housing

- The key factors allowing seniors to stay in their homes are good health, support in daily living, accessible transportation, sufficient finances and an adaptable home.
- Almost universally, a decline in health and/or a reduction in supportive services would be seniors' prime motivation to move from their present home.
- There is not enough seniors' housing on the North Shore.
- The biggest local need is for affordable, congregate care with a meal service as the first priority and in-house social activities and gathering places as the second priority.
- Options that allow seniors to downsize into smaller homes are essential.
- The District should consider allocating specific parcels of land now for future seniors' housing.
- Current examples of successful seniors' housing, such as The Atrium and Lions Manor in Deep Cove should serve as models for future seniors' housing.

Getting Around

- Most seniors drive, rely on others for rides, or take public transit.
- Many seniors will not drive at night and regularly avoid heavy traffic.
- Public transit, although satisfactory, could be improved by accessing many of the residential neighbourhoods off Mt. Seymour Parkway, by installing more bus shelters, and by improving safety at Phibbs Exchange.
- A number of specific sidewalks, crosswalks and intersections are dangerous for senior pedestrians (see Final Report for details).
- Minibus service should be actively encouraged: it serves the transportation needs of many seniors extremely well.

Community Services

- There is insufficient community space in Seymour, and Ron Andrews is not always easily accessible for seniors across the community.
- The addition of the new facility at Parkgate is eagerly anticipated and many seniors hope for a large number and variety of programs there.
- Seniors feel that they can access the arts performances they wish to attend.

- Fire, ambulance and police services are generally satisfactory, though better ambulance response times and more senior-friendly ambulance staff are recommended by service providers.

Values

- Seniors generally value the beauty of the environment and the sense of community in Seymour.

Neighbourhood Assessment

- Given the specific needs of seniors (reasonably flat topography, appropriate housing, transportation, shopping/banking facilities, health and recreation services, social support networks, and personal safety), a preliminary assessment of Seymour's neighbourhoods can be made. The following circumstances contribute to how senior-friendly each neighbourhood is:
- Maplewood and Windridge: level topography is an advantage but dangerous intersections and lack of community space are problematic
- Seymour Heights and Blueridge: it is difficult to get around without a car (hills, lack of transit in inner neighbourhoods, etc.) and there are few shopping opportunities, although recreation services are good
- Parkgate and surrounding area: walking is easy and transit quite convenient with many recreational and shopping services available; a good sense of local community contributes to seniors' support networks
- Dollarton: some shopping but few recreational amenities are available, and access is difficult without a car
- Deep Cove: although topography makes walking around difficult, shopping and recreational services, as well as a good transit and a sense of community, make the neighbourhood responsive to seniors' needs

III. Nature of Focus Groups

The discussion groups and forums held in both Lynn Valley and Seymour used a focus group method. By this method, a group (usually a small group of 4 to 12 people) discusses a topic of concern or interest, with the guidance of a facilitator.¹⁶⁰ As one author notes, “these sorts of discussions generally involve a group which is homogenous in important respects, for example sharing a similar problem or experiencing a similar environment.” The group environment renders possible a number of important benefits:

- participants can “develop a broader and more sensitive grasp of the problem, the issues at stake and how they might be evaluated”;¹⁶¹
- the facilitator can clarify issues and answer questions as discussion proceeds;¹⁶²
- ideas can be “worked out,” that is, developed and expanded upon, as individuals interact and express opinions;
- when groups are locally organized around a specified issue or set of issues, discussion can be productively directed at resolving a particular problem;¹⁶³ and,
- “individuals who participate in small groups are not often those who seek involvement in planning for broader community issues.”¹⁶⁴

Disadvantages of focus groups include: the depth of information provided is necessarily more shallow than in-depth individual interviews; preparation and implementation of multiple focus

¹⁶⁰ Hakim, 1987, 27; Sarkissian and Perlmut, 1994, 21.

¹⁶¹ Sarkissian and Perlmut, 1994, 22.

¹⁶² Sarkissian and Perlmut, 1994, 22.

¹⁶³ Sarkissian and Perlmut, 1994, 22.

¹⁶⁴ Sarkissian and Perlmut, 1994, 21; see also Sarkissian and Perlmut, 1994, 22.

groups can be very time- and resource- consuming; and, the facilitator tends to make a personal or emotional investment in the ability of the group to fully achieve the purpose of the session.¹⁶⁵

Given that the focus group method was used as the basis of the seniors' outreach process in Lynn Valley and Seymour, it is important to note two prime justifications for this approach. Firstly, these groups are "based on the premise that a number of people with different knowledge and skills can contribute to the resolution of a problem or the completion of a task," including assessing community needs and developing social action strategies.¹⁶⁶ Secondly, "the shared concerns of the people attending and the generally comfortable environment act as an incentive for all participants to contribute, notably those who would not comment or ask questions in a larger group or in more formal circumstances. The technique therefore has considerable potential to attract and involve those whose needs and interests would not otherwise be expressed."¹⁶⁷

In addition to the general description and justification of focus groups presented above, there are several relevant points to be made about the importance of group interaction for older adults. Although many planners will admit that directly promoting seniors' well-being and independence is not the prime purpose of seniors participation in a given planning process (but that the focus is, rather, the successful solicitation of seniors' input on given planning issues), well-being and independence are actually long-term objectives of planning, and hence this purpose has relevance here. In general, the group experience "provides the vehicle by which

¹⁶⁵ See, for example, Sarkissian and Perlmut, 1994, 22.

¹⁶⁶ Greene, 1988, 235.

¹⁶⁷ Sinclair in Sarkissian and Perlmut, 1994, 22.

individuals may improve their interpersonal relationships and/or their environmental or social condition.”¹⁶⁸ Benefits to group participation for seniors include:

- sense of belonging, affiliation, and status(which combats social isolation and loneliness);
- validation and affirmation through sharing similar life experiences (confirmation of one’s ‘normality’);
- ventilation and integration of personal opinions in a peer setting;
- opportunities to take on satisfying and meaningful roles;
- growth through interpersonal learning (role models to emulate, new opinions to consider);
- information (learning and increasing knowledge); and,
- problem solving in a supportive environment.¹⁶⁹

Given these potential benefits of focus group approaches to seniors, it is also worthwhile to note the potential concerns this approach may have for older adults as a population group. In the first instance, it is sufficient to say that older adults “deserve to be treated with the equal respect that all other citizens should command. This means that when we come to undertake social research with older people we should observe the normal ethical codes which have developed over the years to given such work.”¹⁷⁰ In this regard, the seniors’ outreach process in the two cases, to the same extent as the general planning process, explained the completely public nature of all the opinions, data, and analysis. That is, participants in the focus groups were informed that their opinions (though not attributed to individuals) would be publicly circulated, as would the summarized results of the discussions and the evaluation of the processes used.

¹⁶⁸ Greene, 1988, 229.

¹⁶⁹ Toseland, 1995, 17-20; Lowy, 1985, 287-293; Berman-Rossi in Monk, 1990, 147-151.

In the second instance, it is important, given the grander social purpose of participatory methods such as focus groups (to promote the inclusion of a potentially excluded group and its issues, opinions, and attitudes), that the approach not be oppressive. The most relevant factor here is ageism in the creation of processes, principally the prejudgement of a certain population group's abilities or the generalization from individuals (and their abilities) to an entire group. As explained above, cognitive decline is not necessarily inevitable or universal, and the adjustment of participatory methods on the basis of general assumptions about seniors prior to concerted field checks (especially the 'dumbing down' of a method's application) reflects prejudice on an ageist basis regarding comprehension or concentration levels.¹⁷¹ In only one focus group session was the workshop agenda specifically modified, in the case of a forum in a seniors care centre, based on suggestions from care centre staff.

IV. Thematic Analysis

After the focus groups, I, as facilitator and coordinator of the seniors' outreach process, employed thematic analysis in the compilation, analysis, summary, and presentation of seniors' issues and perspectives, that is, I processed the information provided by the seniors' focus groups by collating and analysing them according to specific relevant themes.

¹⁷⁰ Butler in Peace, 1990, 170.

¹⁷¹ G. Hoinville, "Carrying Out Surveys Among the Elderly: Some Problems of Sampling and Interviewing," *Journal of the Market Research Society*, 25, 1983, 231 as cited in Carp, 1989, 94.

The literature claims that thematic analysis permits “direct interpretation of an individual’s own point of view and descriptions of experiences, beliefs, and perceptions.”¹⁷² It does so for the purpose of discovering meaning. Thematic analysis allows for summarizing a spoken or written submission to a single phrase or label (a theme) making comparison possible to other such summaries, either by the same or a different individual. Although the coding and systematic comparison requires significant judgement on the part of the analyst (inherent in all qualitative research), thematic analysis demonstrates the importance and meaning of themes to the participants and informants, not just as a construct devised by researchers. The themes are defined through “manifest and explicit statements rather than inference and background knowledge about the person or situation.”¹⁷³ It is the analyst’s task to seek out patterns: “observations and analyses of a regularity, structure, or inferences”¹⁷⁴ in the material submitted, which patterns form the various topics, or summarized labels, of the content of submissions by the various participants. As one author quite emphatically notes: “thematic analysis lends an aura of legitimacy, replicability, and predictability to qualitative findings.”¹⁷⁵

In both of the two cases, the thematic analysis was extremely informal: no numerical count of repeated statements or formal weighting system was used. Instead, I set out general themes along which discussion in the focus groups proceeded (with room afterwards for discussion not covered by the chosen themes). The summary of issues and opinions brought forward was also broken down into these themes. For example, the “Seniors and the Lynn Valley Plan” focus groups discussed issues and opinions on housing, parks and green space, transportation, pedestrian mobility and community services while the “Seymour Local Plan Seniors’ Forums”

¹⁷² Luborsky in Gubrium and Sankar, 1994, 190.

¹⁷³ Luborsky in Gubrium and Sankar, 1994, 195.

¹⁷⁴ Luborsky in Gubrium and Sankar, 1994, 195.

discussed housing, getting around, and community services. This pre-selection of themes was necessary due to the large amount of information presented and the wide variety of smaller sub-themes that might interest participants. However, it may have biased the focus of discussion during the groups. Given this predisposition, the thematic analysis centred on finding whether subtopics were unanimously, frequently, sometimes, or rarely meaningful based on the frequency and strength of statements. Negative or alternate viewpoints were also included as they contrasted with the majority of opinion expressed on any given issue.

V. Facilitator Skills Required for Focus Groups and Thematic Analysis

Focus groups and thematic analysis require specific skills. These skills can be helpfully grouped into three categories namely, facilitation skills, data-gathering and assessment skills, and action skills. Facilitation skills promote improved understanding and communication and lead a group towards a desired goal or decision. Such skills include improving understanding among group members, building open communication channels, and encouraging the development of trust and cohesion in the group. These involve: engaging (making connections and encouraging interactions and leadership), attending (empathizing and maintaining a supportive environment), clarifying, responding (moderating and encouraging viewpoints), focusing, and processing (increasing awareness of dynamics and environment).¹⁷⁵ Data gathering and assessment skills help the researcher-facilitator to understand seniors' needs and concerns. Such skills include: helping individuals to focus, effective questioning, summarizing, partializing (breaking down a

¹⁷⁵ Luborsky in Gubrium and Sankar, 1994, 205.

¹⁷⁶ Toseland, 1995, 65-69.

complex issue), analysing (for data collection quality), and synthesizing data.¹⁷⁷ Action skills are most important for helping the group to accomplish agreed-upon goals and include: validating and affirming individuals' statements, linking statements made by different individuals, promoting full understanding of issues, providing resources, modeling effective group behaviour, guiding interaction, resolving conflict, and confronting discrepancies.¹⁷⁸

Another author lists a similar set of important researcher-facilitator skills in the realm of involving seniors in community planning: relating, motivating, communicating, helping, interviewing, coordinating, timing, enabling, directing/guiding/leading, and anticipating.¹⁷⁹ Yet another characterizes the researcher-facilitator's role as: encouraging full participation, promoting mutual understanding, fostering inclusive solutions, and teaching new thinking skills. Properly applied, these roles beget personal learning, effective groups, and sustainable agreements.¹⁸⁰ Finally, all these skills should be applied in the context of a sensitivity to diversity, by "employing a strengths perspective, acknowledging and exploring similarities and differences in members backgrounds, clarifying the meaning of cultural behaviour, challenging prejudice and discrimination, and advocating for members in situations outside the group."¹⁸¹

On a practical level, implementing the skill set discussed above can entail a variety of particular activities, including:

- "being prepared with statistical and research information that brings new insights;
- asking thought-provoking questions;

¹⁷⁷ Toseland, 1995, 70-71.

¹⁷⁸ Toseland, 1995, 72-76.

¹⁷⁹ Lowy, 1985, 349-350.

¹⁸⁰ Kaner et al, 1996, 33-37.

¹⁸¹ Toseland, 1995, 63-65.

- listening for places when the participants have finished a topic and then summarizing for the group;
- insuring that the participants adhere to the task at hand while allowing them to identify and address issues of particular concern to them;
- referring questions back to the group instead of trying to answer them all yourself;
- supporting the right of those who differ from the majority to hold their divergent views;
- modeling willingness to consider views that are different;
- modeling openness to self-disclosure; and,
- modeling self-examination and willingness to change.”¹⁸²

VI. Conclusion

This chapter has described the two cases evaluated later in this thesis, namely “Seniors and the Lynn Valley Plan” and “Seymour Local Plan Seniors’ Forums,” both of which involved focus groups and thematic analysis. In the first instance, focus groups were used as a means of bringing seniors together to express their ideas and perspectives on the Lynn Valley Plan and planning issues in Seymour. In the second instance, thematic analysis was used to distil issues raised in the focus groups and their importance to local seniors. In order to implement both the focus groups and the thematic analysis, the facilitator needed to use a variety of skills and techniques in the realms of facilitation, data-gathering and assessment, and goal achievement. The next chapter will present the research methodology used to study the effectiveness of these two seniors’ outreach cases.

¹⁸² American Personnel and Guidance Association, 1979, 6.

Chapter 4: Methodology

This chapter provides the reader with an explanation of the research methodology employed to examine the effectiveness of the seniors' outreach process in the two North Vancouver cases. This involves a presentation of the research methods used, namely participant observation, questionnaires, and interviews, including a justification of these methods from the literature. This chapter also addresses several methodological concerns that are raised by employing the methods used here, in the areas of generalizability, qualitative research, and questionnaire design.

Given that *evaluating* the seniors' outreach process (to determine its effectiveness) is the focus of the thesis research, it is worthwhile to briefly discuss what the literature brings to bear on evaluative methodologies. At its most basic, evaluation refers to the use of criteria to specifically judge the efficacy of a service, process, or mode of behaviour.¹⁸³ Evaluation measures the degree to which a planned process or program achieves its desired objectives, implying a certain amount of requisite clarity and specificity of objectives.¹⁸⁴ Evaluations tend to ask certain questions about the appropriateness and effectiveness of various facets of programs or processes, including their implementation. There can be a number of steps in evaluative methodology: understanding specific program or process objectives; developing measures of goal achievement; analyzing strengths and weaknesses of a process, and recommendations for

¹⁸³ Challis and Darton in Peace, 1990, 75.

¹⁸⁴ See .A. Suchman, *Evaluative Research*. New York, NY: Russell Sage Foundation, 1967 as cited in Challis and Darton in Peace, 1990, 75; see also E.M. Goldberg and N. Connelly. *The Effectiveness of Social Care for the Elderly: An Overview of Recent and Current Evaluative Research*. London: Heinemann Educational, 1982 as cited in Challis and Darton in Peace, 1990, 75.

change; and, offering alternatives for accomplishing objectives.¹⁸⁵ One author notes three complications in evaluative research: a less-than-fully-controlled environments makes the definition of inputs difficult; multiple outcomes may require aggregation (on a weighted basis); and, as indicated above, goals may be vague or insufficiently stated.¹⁸⁶ However, another author notes five reasons for the importance of evaluation as a research methodology in practical professional fields such as community planning: public accountability, deployment of resources, effectiveness, cost-effectiveness, and safeguarding against over-enthusiasm for the new.¹⁸⁷ In sum, what is most important is that evaluation encourages "modifications that increase the likelihood of achieving both short-term and long-range objectives" in the planning process.¹⁸⁸ Such improvements to planning knowledge and practice is precisely what this thesis, in some small measure, hopes to achieve. The three subsections below discuss the specific methods used here to achieve these improvement, namely participant observation, questionnaires, and interviews.

¹⁸⁵ See Babbie, 1989, 329 for a suggested method of formulating the research problem within evaluative methodology. See Archer, Kelly and Bisch, 1984, 105 for one author's view on how to design a good method of evaluation.

¹⁸⁶ E.M. Goldberg and N. Connelly. *The Effectiveness of Social Care for the Elderly: An Overview of Recent and Current Evaluative Research*. London: Heinemann Educational, 1982 as cited in Challis and Darton in Peace, 1990, 75; G. Smith and C. Cantley, "Pluralistic evaluation," in J. Lishman, ed., *Research Highlights in Social Work 8: Evaluation*, 2nd edition. London: Jessica Kingsley Publishers, 1988 as cited in Challis and Darton in Peace, 1990, 76; and R. Illsley, *Professional or Public Health? Sociology in Health and Medicine*. London: Nuffield Provincial Hospitals Trust, 1980 as cited in Challis and Darton in Peace, 1990, 76.

¹⁸⁷ E.M. Goldberg and N. Connelly. *The Effectiveness of Social Care for the Elderly: An Overview of Recent and Current Evaluative Research*. London: Heinemann Educational, 1982 as cited in Challis and Darton in Peace, 1990, 75.

¹⁸⁸ Sinnott et al, 1983, 37.

I. Participant Observation

According to the literature, participant observation is characterized by using active participation to observe (and study) a setting or situation; the researcher's personal involvement in the study process is "always a central means to understanding it."¹⁸⁹ It is quite commonly used when a researcher seeks to understand a study problem from the perspective of an insider, or actor, in the situation.¹⁹⁰ As both the facilitator of the two seniors' outreach projects and researcher of this thesis, the present author played the lead role in designing, implementing, analyzing, and evaluating the focus groups, in other words taking on both a participant (facilitator) and an observer (researcher) role in the seniors outreach process and subsequent evaluation.

Although it is generally admitted that participant observation can increase researcher bias (discussed in the next chapter), the methodology literature notes a number of important advantages to participant observation:

- it is ideal for obtaining contextual information or a holistic understanding of an issue;
- in unknown contexts, participant observation provides the preliminary observations required to define measures or study questions;
- it allows for indirect discussion of questions and behaviour that would be inappropriate in one-on-one interview setting;
- group dynamics provide additional meaning to the perspectives discussed; and,

¹⁸⁹ Fry and Keith, 1980, 8-9; for a more detailed description of the stages of participant observation, see Keith in Schaie et al, 1998, 213-216.

¹⁹⁰ Abrahamson, 1983, 255.

- a less formal atmosphere may appeal to older adults (rather than more modern methods of research and opinion solicitation).¹⁹¹

II. Questionnaires

The research employed a participant-completed questionnaire to help evaluate the quality of the specific focus group session and focus groups process. It is therefore important to highlight some criticisms of the participant questionnaire method as affected by using them in an older adult context (concerns related to the design of the questionnaire used will be addressed later in the chapter). Firstly, modern researchers need to keep in mind that many seniors (especially older seniors) may not have extensive experience with questionnaires, multiple choice, or rating scale formats. This factor brings a particular responsibility to bear on the researcher when dealing with older adults, namely special skills and adaptable techniques, not to mention general sensitivity and good researcher-participant rapport.¹⁹² Secondly, seniors seem to be equally comfortable in closed-ended and open-ended formats, with open-ended formats requiring more solicitation of opinion (making the seniors comfortable with the level of confidentiality, placing open-ended questions at the end of questionnaires thus giving participants time to 'warm up' to the methodology, etc.).¹⁹³ In fact, the research and methodology literature shows a certain seniors' preference for non-restrictive, open-ended questions, over simple yes/no response options, while five-point scales were also well-liked (as well as eliciting the smallest amount of

¹⁹¹ Keith in Schaie et al, 1998, 213, 224; Fischer in Gubrium and Sankar, 1994, 6; and Fry and Keith, 1980, 8.

¹⁹² McPherson, 1990, 122.

¹⁹³ See G. Hoinville, "Carrying Out Surveys Among the Elderly: Some Problems of Sampling and Interviewing," *Journal of the Market Research Society*, 25, 223-237 as cited in Carp, 1989, 96; and D.M. Gibson and W. Aitkenhead, "The Elderly Respondent: Experiences from a Large-scale Survey of the Aged," *Journal of the Market Research Society*, 25, 1983, 283-296 as cited in Carp, 1989, 96..

missing data, such as 'no answer' or 'don't know').¹⁹⁴ Some difficulties can also be overcome through placing simple instructions and a sample question at the head of the questionnaire, especially with longer documents.¹⁹⁵ (Researchers should however be extremely careful in selecting sample questions, as the particular sample answer selected may lead participants' responses later in the questionnaire.)

Thirdly, the aging process introduces a number of factors that can bias questionnaire responses, including: hearing and vision difficulties; selective forgetting or short-term memory loss; language difficulties; reduced hand-eye coordination; health problems resulting in discomfort, pain, or fatigue; concerns with mental status; and, intermittent confusion,¹⁹⁶ all potentially leading to inaccurate or misleading data. Finally, seniors may intentionally or subconsciously relate biased answers because of pressure from societal or cultural norms. Such bias can be introduced in a number of situations: perceived lack of anonymity or confidentiality, shielding self from personal failure (e.g., not having understood either information presented or the questionnaire), overly personal questions, unwillingness to be overly critical of others, well-being dependent on responses (e.g., answers that may be critical of a care home environment), specific unstated beliefs or values, perceptions of power and influence, and much more.¹⁹⁷ (This issue will be examined further in the following chapter in the subsection on 'Participant Bias.')

¹⁹⁴ F.M. Carp and A. Carp, "A Complementary/Congruence Model of Well-Being or Mental Health for the Community Elderly," in *Elderly People and the Environment: Human Behavior and Environment: Advances in Theory and Research, Vol. 7*, I. Altman, M.P. Lawton, and J.K. Wohlwill, eds., New York, NY: Plenum, 1984 as cited in Carp, 1989, 97-98.

¹⁹⁵ F.M. Carp, "The Mobility of Retired People," in *Transportation and Aging*, E. Cantilli and J. Schmelzer, eds., Washington, DC: United States Government Printing Office, 1971 as cited in Carp, 1989, 96.

¹⁹⁶ Carp, 1989, 97; Abrahamson, 1983, 350; McPherson, 1990, 122; McAuley, 1987, 181; M.G. Schmidt, "Interviewing the 'old old'," *The Gerontologist*, 15, 1975, 544-547 as cited in McAuley, 1987, 181.

¹⁹⁷ Abrahamson, 1983, 356; Carp, 1989, 102-105; McPherson, 1990, 122; and Burch, 1996, 198-200.

Despite the impact of aging on questionnaire evaluations, given the preponderance and acceptance of questionnaires as quick and immediate evaluative tools in planning practice, it was thought worthwhile to employ it in the two case studies. In both the Lynn Valley and Seymour seniors' outreach process, all participants were asked to complete a short evaluation questionnaire immediately following their focus group. Although some declined, the majority of participants completed a questionnaire (52 out of 76 in Lynn Valley and 39 out of 60 in Seymour). For increased comparability, the questions asked were the same in both the Lynn Valley and the Seymour case studies and used a 5 point scale (poor to excellent) where appropriate (see Figure 4.1).

Figure 4.1 Participant Evaluation Questionnaire

1. Overall, how would you rate this discussion group?
2. Were the information and the questions presented clearly?
3. Do you now have a better understanding of the plan?
4. Did you have ample opportunity to express your views and ideas?
5. Is the discussion group a useful way for you to present your ideas to the District?
Are there other, better ways for you to do this?
6. Any other comments or suggestions?

To respond to the way that seniors as a group may interact with a questionnaire method, the questionnaire used here was contextualized by a number of helpful factors. The questionnaire was briefly explained before distributed, including a confirmation of confidentiality, a request for complete honesty, the option to refuse completion of the questionnaire, and the offer of assistance in answering questions (by the researcher or a fellow participant). In general, the potentially problematic factors described above were acknowledged and dealt with in a

reasonably proactive fashion. However, a few important criticisms of the design of this specific questionnaire are offered in the section below on 'Methodological Concerns Addressed.'

III. Interviews

Finally, this thesis employed simple one-on-one interviews to complement the other evaluative methods used, for a more complete evaluation of the cases studied. Two interviews were conducted, one each with the planner in charge of the Lynn Valley Official Community Plan and with the planner in charge of the Seymour Local Plan. The researcher first introduced the purpose of the interview, namely, to ascertain the planner's perspective on the seniors' focus group performed in their respective communities. The researcher then asked each planner the same three questions:

1. Do you feel that the focus groups were an effective way of including seniors, seniors' issues, and seniors' perspectives in the community planning *process*?
2. Do you feel that the focus groups were effective in including seniors, seniors' issues, and seniors' perspectives in the official community *plan*?
3. Do you feel that there are possible *improvements* to the process used and/or are there *better processes* for including seniors, seniors' issues, and seniors' perspectives in community planning?

The answers to these questions will be presented in the following chapter on results, but a short discussion of interview methodology is warranted here.

Interviews are generally considered to be a face-to-face or electronic exchange of information between two individuals, but this interaction can range "from an interviewer's active

interrogation of a passive respondent to an interviewer's passive attentiveness to an active respondent."¹⁹⁸ In this thesis, for example, the researcher took on a reasonably passive role, asking the question and then allowing the respondent to answer as they saw fit. The researcher only intervened with a neutral probing question if the respondent did not fully answer the question asked, in order to obtain more complete and relevant responses.¹⁹⁹ Despite an apparent lack of structure in the interviewing strategy (allowing the interviewee to speak freely about the question asked), each interview was indeed structured by its presentation of the three questions, identically-worded in each interview. Such standardization allows a better comparison between different cases and facilitates analysis of change or differences, combining these advantages with the depth and naturalness of a nondirective interviewing strategy.²⁰⁰ Although perhaps less complex than the participant observation or questionnaire methodology, the interviews provided an additional important evaluation of the seniors' outreach process.

IV. Methodological Concerns Addressed

As explained towards the beginning of this chapter, evaluation plays an important role in improving the planning process. This thesis strives to provide the basic components of an evaluation, namely background, purpose, methodology, and findings, as well as limitations²⁰¹ as provided in this section. The evaluation methods presented above also follow the general principles for what should be included in such evaluative research, as suggested by the literature: what (are there clear operational objectives for the case research?), who (who are the actors in

¹⁹⁸ Abrahamson, 1983, 332.

¹⁹⁹ Babbie, 1989, 244, 248.

²⁰⁰ Abrahamson, 1983, 338.

the evaluation?), where (what are the data sources?), when (what are timelines for the cases?), and how (what are the techniques and methods for analysis?).²⁰² The evaluation also covers relevant ground in the three categories recognized as important characteristics of evaluative research, namely inputs (what are the characteristics of the cases?), performance (what are the outputs of the case research?), and outcomes (what are the impacts of performing the case research?).²⁰³ The results of this evaluative research will be presented in the next chapter. This section critiques the case research performed according to data quality, research typology, and questionnaire design.

1. Representativeness, Generalizability, Predictability, and Triangulation

In evaluating virtually any research, critiques inevitably arise concerning the representativeness and the generalizability of the results, in other words, elements of data quality. That is, are the findings presented truly representative of the community studied? But also, do the findings that hold true in the case studies hold true for other similar situations? This researcher is not suggesting that the case studies should be required to perfectly (or even partially) satisfy these two difficult conditions: case studies are rarely expected to be either representative or generalizable. However, the short discussion that follows is provided to recognize that this thesis could provide several generalizable contributions and that the research is, regardless of generalizability, nonetheless worthwhile.

²⁰¹ Archer, Kelly and Bisch, 1984, 115.

²⁰² Salamon, 1986, 170-171.

²⁰³ Steinberg in Mangen and Peterson, 1984, 177.

In the first instance, for those researchers focusing on representativeness, generalizability, and predictability, the methods employed here may be viewed as problematic. No random sample was used, no control group employed, no great efforts were made to externalize all variables. The seniors outreach performed and the evaluation that ensued were not designed as a controlled scientific experiment. However, the sample of seniors who participated in the workshops raised issues and viewpoints that were reasonably representative of seniors in the community, perhaps more so in that a number of participants were community leaders with a detailed grasp on a wide variety of local issues. The less-than-perfect representativeness of the sample (which nonetheless produced significant results) is more than mitigated by the generalizability of the *process* to other communities. That is, this process, if repeated in other roughly similar situations, is extremely likely to yield the same type of sample, even its slight unrepresentativeness. If the substantive policy outcomes (which are not the focus of this thesis) are slightly biased in favour of the opinions of those who tend to join workshops, then the replicability of the process (which is the focus of this thesis), is much more than satisfactory. It is not so much the representativeness of the focus groups vis-à-vis the local seniors community that is of utmost concern, but that the process of including seniors used in the cases studied can prove an appropriate and effective means of including seniors, seniors' issues, and seniors viewpoints in community planning efforts.

What then is the predictability of the research, namely, its ability to predict outcomes, or even perform prescriptively, in other planning contexts? It should be said that this ability, although perceived as highly desirable in pure scientific research, seems rarely to be valued (perhaps because of the inability to achieve it?) in planning circles. Planners, dealing with so many unknowns and variables, often find guidelines more valuable than prescriptions. One author puts

it succinctly as follows: “the focus of human sciences is understanding... Indeed, there is reason to believe that at the level of understanding human meaning, prediction might well be a theoretical impossibility.”²⁰⁴ What the research results discussed in the next chapter provide therefore is not a perfect prediction of causal outcomes but rather a set of guidelines by which a reasonably effective seniors’ outreach process might better include seniors, seniors’ issues, and seniors’ views in local planning efforts. Not only will the process prove usable in other planning contexts or communities but it nearly guarantees an improved understanding of local planning through the inclusion of older population groups.

In critiquing the quality of the research performed, it should be noted that the researcher has also attempted, with good cause, to triangulate the data, through the use of a variety of complementary methods of evaluation. Although triangulation is generally assumed to be beneficial in many research situations, it is all the more relevant here. Gross satisfaction levels amongst older adults with regards to services and issues are no longer sufficient measures of either individual happiness or community functionality. Rather, a multi-dimensional approach, using a variety of evaluative methods, provides here a better understanding of what constitutes successful process than could have a single method of evaluation.

2. Qualitative and Quantitative Methods

In evaluating the methodology of this thesis, it is worthwhile to briefly acknowledge much of the discussion in the literature about quantitative vs. qualitative methods, or research typology. The present research, for the most part, has used a complementary selection of qualitative methods,

²⁰⁴ Thomas in Thomas, 1989, 4.

with some quantitative data provided by participant questionnaires. As the literature is rich in reasons to favour quantitative research, this section briefly explains some of the basis, according to the literature, for favouring qualitative methods for the present research. Both research typologies are important. As one author explains, “quantitative and qualitative methods can similarly be conceived as lying either side of a common reference point, both methods contributing indicators which we might expect to inform the topic under scrutiny or consideration.”²⁰⁵

One author’s explanation of qualitative research reflects almost perfectly reflects the manner in which community planning works. “Qualitative research is concerned with individuals’ perceptions, attitudes, beliefs, views, and feelings,... and illuminates the motivations which connect attitudes and behaviour,... or how conflicting attitudes and motivations are resolved in particular choices made.”²⁰⁶ The patterns that emerge from concrete personal details expressed by individuals are what make up a community’s needs, wants, and plans for the future. As with the domain of planning, qualitative research acknowledges the role of the researcher (planner) in obtaining data through rapport with participants (residents).²⁰⁷ Suffice it to say that qualitative methods, as a whole, have not yet been proven inferior or faulty, especially in reference to so practical a field as community planning. Given the tension between qualitative and quantitative methods in planning research, this thesis walks a middle road by including methods of both types.

²⁰⁵ Kellaher, Peace and Willcocks in Peace, 1990, 121.

²⁰⁶ Hakim, 1987, 26. See also Hakim, 1987, 27 and Sankar and Gubrium in Gubrium and Sankar, 1994, vii, ix.

²⁰⁷ See Sankar and Gubrium in Gubrium and Sankar, 1994, viii, xiv.

3. Questionnaire Design

Although the participant questionnaire will be shown to have elicited important information about participants' opinions on the seniors' outreach process, it is important to note some criticisms of the specific questionnaire used in the two cases. In relation to the recommendations from the literature on questionnaire construction,²⁰⁸ the questionnaire created and used here:

- fortunately, does not contain overtly leading questions;
- fortunately, does not contain any highly ambiguous questions;
- fortunately, does not make use of biased or loosely defined terms;
- unfortunately, does contain questions (nos. 2, 3, and 4) that suggest a particular response, e.g., every participant would like to claim they now have a better understanding (the opposite choice would be to be labelled 'ignorant' or 'incapable of learning');
- unfortunately, does contain a double-barrelled question (no. 5), which leads to confusion about how to answer the question concisely and accurately (however, other questions are for the most part concise, clear, unambiguous, and not phrased in a negative manner);
- fortunately, does provide respondents with the opportunity to provide additional, open-ended comments;
- fortunately, does not display any overtly biasing question order (and, in fact, places the most open-ended question at the end);
- fortunately, is entirely and directly relevant to the workshop the respondents just participated in; and,
- fortunately, is short, uncluttered, and relatively easy to read.

²⁰⁸ Determinants of a good questionnaire were provided by two reputable sources: Babbie, 1989, 139-152; and Abrahamson, 1983, 314-326.

This critical analysis of the questionnaire used suggests a couple of possible improvements, such as:

- rewriting the questionnaire to include a 5 point scale in questions 1 through 5; and,
- rewriting question no. 5 into two questions (e.g., “Is the discussion group a useful way for you to present your ideas?” yes/no “What are some other [better] ways for you to do this?” open-ended answer).

IV. Conclusion

This chapter has provided the reader with an explanation of the methodology employed in this thesis. The dual role of facilitator in the seniors outreach process and researcher in the evaluative analysis permitted participant observation as an evaluative method. Participant questionnaires served as a second method of evaluating the effectiveness of the seniors outreach process. One-on-one interviews with the two planners managing the Lynn Valley and Seymour Local Plans provided a third means of evaluating the process. Finally, this chapter addressed several important methodological concerns. Although perhaps the case processes were less than representative and imperfectly predictable, the evaluation methodology, based on the literature, is certainly generalizable to other cases, while the complement of different methods (including both qualitative and quantitative methods) provides some opportunity for triangulation. Lastly, this chapter provided a criticism of the questionnaire design, including important recommendations for participant questionnaires in future similar seniors' outreach processes. The next chapter discusses the findings from the evaluative research, namely an analysis of the

effectiveness of the seniors' outreach process and factors influencing the effectiveness of a seniors' outreach process.

Chapter 5: Findings

The purpose of this chapter is to discuss the results of the thesis research performed, namely to provide an evaluation of the effectiveness of the seniors' outreach process in the two case studies, as well as factors contributing to the effectiveness of these processes. To this end, this chapter first examines the effectiveness of the seniors' outreach in Lynn Valley and Seymour from the perspective of participating seniors, District planners, and myself, the facilitator-researcher. It then further evaluates the effectiveness from the perspective of the District's public participation guidelines and of the literature on public participation. It then discusses the factors influencing the effectiveness of the outreach process used, including the participant selection process, focus group logistics, resources allocated, the facilitator's skills, and participant bias.

I. Outcomes

This first section discusses the effectiveness of the seniors' outreach process used in Lynn Valley and Seymour from three perspectives. Firstly, it presents the perspective of the seniors involved in the outreach process, principally through their responses to the evaluation questionnaires distributed following each focus group. Secondly, it provides the perspective of the District planners on the effectiveness of the seniors' outreach process. Thirdly, I offer my own observations on outcomes based on my participation in all phases of the process and my analysis of the content of the resulting plan documents.

1. From the Perspective of the Seniors Involved

As discussed in the chapter on methodology, an evaluation questionnaire was used in both the Lynn Valley and Seymour seniors' outreach process: all participants (seniors and, in the Seymour case, service providers) were asked to complete a short evaluation questionnaire immediately following their focus group, with the same questions asked in both the cases used. Although some declined, the majority of participants completed a questionnaire (52 out of 76 in Lynn Valley and 39 out of 60 in Seymour). The answers provided are compiled in Figures 5.1 and 5.2.

As evidenced by these compiled results, the participants (seniors and service providers) felt that the sessions were overall very good or excellent, that material was on the whole clearly presented, and that they had had a better understanding of the local community plan following the focus groups. Specifically, 94% of the Lynn Valley respondents and 89% of Seymour respondents stated the focus group they attended was either very good or excellent. 98% of Lynn Valley respondents and 100% of Seymour respondents felt that the material was clearly presented while 85% of Lynn Valley respondents and 100% of Seymour respondents stated they now had an improved understanding of their local community plan. There may be some explanation for the different responses from the two case groups: it is possible that in the case of clarity of material presented and improved understanding of the plan, since the Seymour case constituted a presentation and discussion of issues, not a draft plan (as was the case in Lynn Valley), Seymour's presentations may have been less complicated and hence by nature easier to understand than Lynn Valley's.

Figure 5.1 Seniors' Planning for Lynn Valley: Results of Participant Evaluation Questionnaire

1. Overall, how would you rate this discussion group? (please check)

Excellent	Very Good	Good	Fair	Poor	NA
24	21	2	1	-	4

2. Were the information and the questions presented clearly?

Yes	No	NA
49	1	2

Comments:

"Questions presented clearly. Information a little scattered." - LV Library

3. Do you now have a better understanding of the Lynn Valley Plan?

Yes	No	NA
52	-	-

Comments:

"Little better. Still complicated." - LV Library

4. Did you have ample opportunity to express your views and ideas?

Yes	No	NA
51	1	-

5. Is the discussion group a useful way for you to present your ideas to the District?

Yes	No	NA
43	-	9

Are there other, better ways for you to do this?

Yes	No	NA
3	3	46

Comments:

"Good response from the first discussion group [good comeback rate from last year's initial discussion group series]." - St. Stephen's

"Useful yes. Plus taking the time to write the district." - Silver Harbour

"Yes, as long as they're taken notice." - Silver Harbour

"This is an excellent way for people to present ideas which may otherwise be overlooked." - LV Library

"This was very suitable." - LV Library

“Should cover more. Did not discuss building directly by our building which will block our view.” - Silver Lynn

“What about a district government official who already knows what can be done and what is already in the works.” - Silver Lynn

6. Any other comments or suggestions?

“The instructor gave us plenty of time to quote our ideas. She couldn’t have been better. Thank you.” - Silver Harbour

“Keep it up!” - LV Library

“Just keep the good work going.” - LV Library

“Very glad that we attended. We were not aware of many of the problems involved.” - LV Library

“Keep up the good work.” - Draycott

“Keep the process going!” - Draycott

Figure 5.2 Seymour Local Plan Seniors' Forums: Results of Participant Evaluation Questionnaire

1. Overall, how would you rate this Seniors' Forum (please check)?

Excellent	Very Good	Good	Fair	Poor	NA
15	19	4	-	-	1

2. Were the information and questions presented clearly?

Yes	No	NA
38	-	1

3. Do you now have a better understanding of the Seymour Local Plan?

Yes	No	Somewhat	Already Knew	NA
33	2	3	1	-

4. Did you have ample opportunity to express your views and ideas?

Yes	No	Fair	NA
36	-	1	2

5. Is the discussion group a useful way for you to present your ideas?
Are there other, better ways for you to do this?

Yes	No	NA
34	-	5

6. Any other comments or suggestions?

"would like more [Forums]"

"the success of this meeting should be reported in the local press"

"any future follow-ups?"

Participants also felt that they had ample opportunity to express their ideas and that the method was generally useful for expressing their ideas to the District. Specifically, 98% of Lynn Valley respondents and 97% of Seymour respondents found they had ample opportunity to express their ideas, not surprising given that the purpose of the focus groups was to elicit participants' opinions and ideas on issues of importance either in general or in response to a draft plan. In both cases, 100% of respondents found the focus group to be a useful way to present their ideas on planning issues of concern to local seniors. Also, specific comments, as presented in Figures 5.1 and 5.2, suggest a generally positive, valuable experience. Overall, according to participants' feedback, the process used here to include seniors in local community planning efforts was generally felt to be useful and effective.

Beyond the seniors' assessment of the outreach process, the outreach (either directly or indirectly) has likely had an impact on the community and on local seniors. The focus group results and evaluation of the process reached participants, but in some measure also reached those individuals and groups who seek to effect changes that benefit seniors. A short document summarizing the content of the focus groups was prepared for each set of groups and was sent to all focus group participants (including service providers in the Seymour case) as well as other interested service providers.

One author succinctly states the standards by which to judge the success of a project, that is, in terms of the change it can affect to the benefit of local seniors. "Arguably, a project which has been defined in association with older people or their agents and has espoused their world view; is carried out by a research team that is supported by those who command resources and determine policy; is looking at issues with an understanding of the structural differences that

constrain life chances for older people; and, which is not perceived as 'threatening' to dominant values at a populist level will have the greatest potential for stimulating real change.'²⁰⁹

Although the projects were perhaps not sufficiently inclusive of seniors and seniors' viewpoints in the project planning stage, the seniors' outreach performed was reasonably well supported, came from an informed gerontological perspective, and was situated within a municipally-supported planning process. Hopefully the implementation of these plans will provide opportunities for, and meet the needs of, the local seniors they intend to serve.

2. From the Perspective of the District Planners

As a second analysis of the effectiveness of the seniors' outreach process, an interview was performed with each of the two planners in charge of the two communities studied. In the first instance, as part of each planner interview, each planner was asked whether they felt that the seniors focus groups were an effective way of including seniors, seniors' issues, and seniors' perspectives in the community planning process. This question was intended to elicit information and opinion from a staff perspective on whether the process was a suitable form of participation for seniors in the community. In the first instance, both planners stated that the process was indeed suitable. They then confirmed a number of the criticisms, concerns, suggestions, and solutions provided by seniors involved and by the literature.

Both stressed the difficulty of getting ongoing seniors' participation in the two residents committees that were shepherding the planning process: lengthy and frequent evening meetings discouraged seniors' participation (youth and the business community also found it

²⁰⁹ Osborn and Willcocks in Peace, 1990, 202.

discouraging).²¹⁰ In the Seymour case, the planner further explained the characteristics of those who found traditional participation methods discouraging: those who are unable to drive, those who do not venture out at night, women, and frailer seniors in care or at home.²¹¹ The seniors' focus groups were a targeted solution that brought the opportunity for participation to seniors where they were. This solution consciously required the focus groups to take place at times and locations where seniors already found themselves, and included further detailed measures such as offering transportation to the event and including service providers that could speak about the experience of isolated, frailer seniors still living in their own homes, seniors who might otherwise have been excluded from even the special seniors process. Both planners felt that the seniors' outreach process significantly improved on the regular participation processes (meetings, open houses, etc.) in including seniors, their issues, and their perspectives in the planning process. One planner suggested that this type of process was needed until such time as local seniors come together themselves to represent seniors in their community to government, business, and other community groups: interestingly enough, the Seniors and the Lynn Valley Plan process has resulted in the creation of the Lynn Valley Seniors Association,²¹² a non-profit society devoted to increasing social and recreation opportunities for local seniors as well as increasing the presence of seniors and their issues in the community.

The two planners also suggested a couple of improvements to the seniors' outreach process used. First, the Lynn Valley case demonstrated the importance of a second 'pass' through the seniors community, namely that not only initial information and opinion gathering sessions be implemented but that the draft plan be brought back to the seniors community for further

²¹⁰ Paton, 2001; and Chapman, 2001.

²¹¹ Paton, 2001.

²¹² Chapman, 2001.

refinement and approval.²¹³ This will likely not be done in the Seymour case. Secondly, the Seymour case improved on the Lynn Valley example by including a session with representatives of various agencies serving seniors. This provided a different perspective on appropriately fulfilling seniors' needs and included the opportunity to gather information about frailer isolated seniors through their caregivers.²¹⁴ Perhaps this line of reasoning could extend to the inclusion of family members living with seniors, regardless of the senior's health status, provided there was a mechanism for weighting and analysing these 'second-hand' opinions. Also, focus groups of non-seniors could engage in an exercise to project their lifestyles and needs into the future for additional ideas on long-range planning for seniors. Finally, the planner in charge of Lynn Valley recommended that the regular participation process and the seniors' outreach process be better interwoven: this could be achieved by pre-designating certain meeting agendas for discussion of issues of particular interest to seniors (the Seymour process achieved greater integration through an individual working for a local seniors service provider who volunteered her time to advocate for seniors at regular planning meetings).²¹⁵ In all, both planners agreed that the seniors' process was a worthwhile improvement on the regular participation process and, incorporating the specific improvements mentioned, could be suitably and effectively used in the future.

3. From the Perspective of the Facilitator-Researcher

The third important analysis of the effectiveness of the seniors' outreach process comes from my perspective, that of the facilitator-researcher. I believe that the process used in the two cases

²¹³ Paton, 2001.

²¹⁴ Paton, 2001.

²¹⁵ Chapman, 2001.

studied here was indeed effective on a variety of levels. Firstly, the process was reasonably open and did indeed attract participants from a sufficiently varied set of backgrounds. It is unlikely that any regular participation process (designed for the general public) would have achieved similar levels of participation from seniors. Secondly, the general level of involvement of seniors in community issues, including community planning, appears to have been maintained or possibly increased: the seniors group in the Parkgate area of Seymour are still vocal on issues surrounding access to recreation while the Lynn Valley Seniors Association arose directly out of the Lynn Valley seniors' outreach process. Furthermore, the Lynn Valley Seniors Association is presently 130 members strong, with activities including a speakers' series on issues of interest to local seniors (including monitoring planning developments in Lynn Valley), a pedestrian safety committee, and involvement in recreation planning. Thirdly, the information provided by the seniors' focus groups was sufficiently detailed and practical to be of significant use in the creation of the plan. Through the groups, seniors confirmed the general suspicions of the facilitator and planners as to seniors' needs and views regarding such issues as transportation, housing, and community services. However, they also provided detailed and practical suggestions, such as specific intersections and traffic patterns that were dangerous to seniors as pedestrians or drivers and suggestions on how to improve these situations. There was a reasonably high degree of agreement on both the general issues and specific concerns, perhaps making their inclusion in the plans more likely.

In the final instance, perhaps the least subjective perspective I can provide on the effectiveness of the seniors' outreach process is a comment on how effectively the ideas and opinions expressed in the seniors' outreach process were expressed in the two local community plans. In the first case of the Lynn Valley Official Community Plan, it is somewhat difficult to ascertain the

specific impact of the Seniors and the Lynn Valley Plan workshops, as the importance and relevance of seniors issues was felt right from the start of the planning process and throughout its three year history. As the case used here consisted of evaluating and refining established community issues from a seniors' perspective (the plan had already been prepared in draft form), the details and approaches they provided to the plan were naturally comprehensive, concise and well-refined. It is however a credit to the planners and planning process that the seniors' outreach was not viewed as an external or additional side-process, and that the recommendations were virtually in their entirety included in the plan (including, in some cases, the mechanisms for implementation). One mitigating factor confuses the overall impression that the plan itself included seniors' issues and viewpoints thanks to this specific seniors' outreach process. The manager of social planning at the time of the planning process was actively advocating on behalf of including seniors and their opinions in the planning process from the very beginning. She also established a number of successful and practical seniors' outreach opportunities at the various stages of the planning process. That is, this staff person (and not just the outreach process itself), through her commitment to including seniors, seniors' issues, and seniors' perspectives in the Lynn Valley Plan, may have been a major driving factor in this inclusion: if this is the case, the focus groups may have come to fruition mostly because of a pre-existing staff commitment to inclusion. On the other hand, the planner in charge of the Lynn Valley Plan noted another possibility, namely that the resident committee coordinating the creation of the plan were individually and collectively committed to the concept and practice of inclusion. Their openness to incorporating seniors' issues and perspectives could also explain why so much of the information and opinion derived from the seniors' outreach process was explicitly written into the plan.²¹⁶

²¹⁶ Chapman, 2001.

In the case of the Seymour Local Plan, the impact of seniors' issues and viewpoints (through the Seymour Local Plan Seniors' Forums) is both easier to measure and harder to evaluate. Since only Phase One of the plan has been completed, the Community Vision Statement produced as well as the subsequent options formulated by the planning department are the only bases of evaluation. The two direct impacts of seniors' outreach were: a presentation of the forum results to the Seymour Local Plan Coordinating Committee and the appointment of a seniors advocate to the committee; and, the inclusion of the full report on the forums in the background materials provided to the planning department along with the Community Vision Statement. One of the visible achievements of the seniors' outreach process was the inclusion of 'additional opportunities for seniors housing' among the nine 'common essential elements' for the Seymour Local Plan options. In the three Seymour Plan Options and Long Survey Feedback Form, opportunities for seniors housing were noted in specific neighbourhoods, while passing mention was made of some improvements to public transportation and improved selection of retail shops in specific neighbourhoods. However, the overwhelming majority of options and opportunities referred to issues and amenities of direct benefit to families and non-seniors. The planner in charge of Seymour noted the difficulties in assessing the impact of the forums on the plan (given the early stage) but felt that the seniors' forums had indeed influenced the planning options that would be presented to the public for approval.²¹⁷

²¹⁷ Paton, 2001.

II. Evaluation

This section provides an evaluation of the seniors' outreach process based on two perspectives: first, the guidelines prepared by staff and adopted by council as to what constitutes acceptable public involvement in planning and second, the guidelines provided in the literature as to what constitutes effective public participation.

1. From the Perspective of District Participation Policy

First, it is important to evaluate the effectiveness of the seniors' outreach process vis-à-vis the guidelines set out by the District staff and council for public involvement in municipal planning efforts. In May 1996, the District of North Vancouver completed a one-year research project resulting in a manual of policies, principles, and practices to be incorporated into the processes of public involvement designed and implemented within the District.²¹⁸ This manual delineates a set of guiding principles for local public participation efforts and the two cases can be evaluated against these municipally-generated guidelines. Table 5.1 presents the guidelines, against which I have judged the cases studied here (simply as good, fair, poor, or not applicable), with comments to explain my judgement.

²¹⁸ Corporation of the District of North Vancouver, 1996, vol.1, 6-7.

Table 5.1 District of North Vancouver's Guiding Principles for Public Involvement and Related Judgement of the Cases

Standard	Good	Fair	Poor	NA	Comments
Integrity <ul style="list-style-type: none"> early and on-going opportunities for participation process leaders must show integrity, commitment to process, fairness and objectivity) 		x			Opportunities for participation in the seniors' outreach process were varied and multiple, however the opportunity to design the seniors' outreach process was not available.
Flexible <ul style="list-style-type: none"> processes must be open to change public involvement over the long term needs to be seen to have impacts 			x		No opportunity to change the seniors' outreach process was available and, despite explanations of the general process, a significant number of participants felt their voice would not result in any of the changes they requested.
Responsive <ul style="list-style-type: none"> processes must be meaningful to participants (quality of opportunities for involvement and real impacts on decision making process) timely feedback to those involved (what has emerged from process and why) 		x			Although participation was felt to be interesting and intrinsically valuable, the connection to real impact was weak. Although reports from the seniors' outreach process was made available to all participants, connections to the general planning process were weak.
Open and Informed <ul style="list-style-type: none"> open access to information 	x				A great deal of effort was made to summarize past issues and actions in a comprehensible format.
Collaborative <ul style="list-style-type: none"> building agreement on facts then issues and problems 	x				The seniors' outreach model was based on a collaborative approach to contextualizing issues and finding solutions to community problems.

Standard	Good	Fair	Poor	NA	Comments
Fair <ul style="list-style-type: none"> people involved should reflect the full range of interests integrity of the process must be protected from domination by a single group 		x			Although full representativity was not achieved (non-joiners were not well represented), no single group dominated or attempted to dominate the seniors' outreach process (unlike the inter-interest group conflict present in the general planning process).
Clear <ul style="list-style-type: none"> process needs to be fully explained and everyone needs to respect the agreed-upon process 		x			The process was fully explained to all participants; however, participants did not help initially design the process.
Efficient <ul style="list-style-type: none"> sufficient time staff, volunteers and resources must be allowed 		x			Although the seniors' outreach process was considerably more streamlined and compact than the general process, there is some doubt as to whether sufficient resources were allocated for the outreach (see section below on 'Resources Allocated').

Source: Corporation of the District of North Vancouver, 1996, vol.1, 6-7.

The reader will recall that from the perspective of both the seniors involved and the two planners interviewed, the seniors outreach process could be described as very good, or at least a significant improvement on using the regular participation process for acquiring seniors' ideas and opinions. However, the evaluation of the same processes by the guidelines provided by the District of North Vancouver for its own public participation efforts resulted in a score of 'poor' to 'fair.' Factors such as integrity, flexibility, responsiveness, fairness, clarity, and efficiency were all areas in need of improvement. This interesting discrepancy could be explained in

several ways. Firstly, the seniors' outreach process is intrinsically unlike the general local community involvement process and could not be expected to adhere to the same standards. Secondly, the District's guidelines (in comparison with the general guidelines provided by the literature in the next section) were very specific and practical, and may be therefore by nature harsher and more demanding than any literature guidelines covering multiple participation processes in multiple locations (see next section). However, regardless of any possible explanatory rationales, the low evaluation scores certainly provide additional criticisms of the Seniors and the Lynn Valley Plan focus groups and the Seymour Local Plan Seniors' Forums not covered by the evaluative methods used above.

2. From the Perspective of the Public Participation Literature

The literature review has already presented an explanation of public participation, including approaches and standards, while the description of the cases provided the explanation of how public participation was applied in two specific instances. The analysis of the two sets of focus groups according to standards from the literature, as provided below, will help evaluate whether the processes used in the two cases are, from the perspective of public participation literature,, suitable ways to include seniors, seniors' issues, and seniors' perspectives in community planning efforts.

The tables below consist of public participation guidelines from academic (two sources), government, and community-based perspectives. In each table, the standard is described, a 'grade' is collectively assigned to the two case studies (how well they performed according to the standard listed), and then additional comments are provided. The rating of 'good,' 'fair,' or

'poor' (or NA, not applicable) is a somewhat subjective grading system in that the present researcher was also the focus group facilitator of the two cases. However, in each case, the researcher attempted to provide responses as objectively as possible, keeping foremost in mind the stated evaluations of the participants and District planning staff. Comments are provided to explain the rating given for each standard.

Table 5.2 Evaluation of the Effectiveness of the Seniors Outreach Process from the Perspective of the Literature: A First Academic Approach to Standards

Standard	Good	Fair	Poor	NA	Comments
Explaining the nature of what is to be planned	x				The process of local community planning as well as substantive information on community characteristics was presented.
Relating the citizen participation process to scarce resources of money and time		x			Little time was allocated toward making choices, though some prioritization was performed.
Meeting the requirements of any laws governing the process	x				The process was mandated by the District of North Vancouver community planning department, under participation guidelines approved by the elected mayor and council.
Discerning community values, knowledge and ideas	x				The entire process concerned discerning this information.
Structuring the goal setting process				x	Goals were already set by the planning department (perhaps seniors should also have been involved in this process).

Standard	Good	Fair	Poor	NA	Comments
Aiding citizens and others participating in understanding the relationship of their inputs to others		x			A thorough explanation of how the seniors input fit in with the local community planning process was provided, though more ongoing seniors' involvement in the general process could have been promoted.
Reaching the broader community		x			A number of active seniors were reached and well-represented, though the sample was certainly not entirely representative of the seniors in each community (especially of not representative of 'non-joiners').

Source: Larry B. Morrison, *Toward Improving the Process of Citizen Participation*, 1973, 7-14, "Suggested Tools to Assist Citizen Participation"

Table 5.3 Evaluation of the Effectiveness of the Seniors Outreach Process from the Perspective of the Literature: A Second Academic Approach to Standards

Standard	Good	Fair	Poor	NA	Comments
Openness: enable the various points of view of the major actors involved with a planning problem to be expressed to public decision makers	x				A significant amount of suitable and accessible advertising made community members, including seniors, aware of the options for involvement.
Broad representation: provide the professional skills and resources needed to ensure that all actors involved would be represented accurately, competently, and vigorously	x				The seniors' outreach process provided the extra resources needed to involve this section of the community.

Standard	Good	Fair	Poor	NA	Comments
Fairness: establish a system of inquiry that would treat all of the actors equally, especially in terms of resources (including time) made available to each actor for research, planning and presentation	x				Again, the seniors' outreach process provided the extra resources needed to involve this section of the community (providing an unequal, but more equitable, resource to this population group).
Hostility reduction: provide a decision environment that would help to de-escalate the hostility and alienation that could develop between conflicting actors, so as to enable each actor to consider more objectively the views of others	x				The researcher-facilitator's training in conflict resolution ensured a comfortable and accessible environment during the seniors' process. However, the general community planning process in both cases was conflict-prone.
Provide information: present each view, together with supporting documentation and analysis, in a manner that helps clarify the issues involved and provide useful information for all parties concerned	x				Both cases, though especially the Lynn Valley process, provided seniors with a considerable amount of information about local planning issues and efforts (including the distribution of the report from each seniors' outreach process to interested participants).
Encourage broad citizen participation: develop mechanisms that exposes a range of views and provide a means of registering preferences for the resolution of these problems		x			Although the seniors' outreach process provided an additional mechanism for involvement, the general local planning process provided a wider range of opportunities for involvement and for registering opinions.
Responsiveness: create a setting that would induce decision makers to really consider and respond to the concerns and proposals of the actors and the public		x			The general planning process had more political clout and absorbed the seniors' outreach process into its ongoing mechanisms for planning and implementation.

Source: Donald Rothblatt, *Planning the Metropolis: The Multiple Advocacy Approach*, 1982, 11-12, "Multiple Advocacy Approach to Public Involvement"

Table 5.4 Evaluation of the Effectiveness of the Seniors Outreach Process from the Perspective of the Literature: A Government Approach to Standards

Standard	Good	Fair	Poor	NA	Comments
Seeks to identify change and respond to it as an opportunity and a challenge				x	A process (or desired change in local planning) had already been identified, which led to both the general local planning processes and the seniors' outreach. The general process was however used as an opportunity for ensuring all population groups were adequately represented in local planning.
Seeks to understand and to facilitate inclusive citizen involvement	x				The nature of the seniors' outreach was preceded by planning department reviews of public participation (previous years) and was, by necessity, overtly inclusive.
Seeks to create win-win situations that contribute to the well-being of the community	x				In addition to collecting seniors' opinions, the seniors' outreach also strove to involve seniors in their community and its planning efforts.
Works to ensure that the decision making process is inclusive, clear, and accessible to the community		x			More effort could have been made to include seniors in the ongoing, general process of local planning process.
Uses education to bring people together	x				A great deal of information about local issues was provided, especially in the Lynn Valley case.

Standard	Good	Fair	Poor	NA	Comments
Builds and/or restores community faith in itself to affect positive change		x			As the seniors' outreach approach was somewhat separated from the general local planning process, seniors may not have felt that positive about their ability to affect change (though questionnaires indicated they felt the process to be effective in this regard).
Listens as often as talks, practises collaborative problem-solving and consensus-based decision making	x				The entire outreach model was premised on this approach.

Source: BC Ministry of Municipal Affairs, *Social Planning for BC Communities: A Resource Guide for Local Governments*, 1996, 24, "Principles for Community Participation"

Table 5.5 Evaluation of the Effectiveness of the Seniors Outreach Process from the Perspective of the Literature: A Community Approach to Standards

Standard	Good	Fair	Poor	NA	Comments
Planners listen to residents concerning their attitudes, goals, fears and factual suggestions	x				Planners, with a great deal of cooperation from communities, ran a participation process (and in the Lynn Valley case are now implementing the community's planning efforts).
Citizens find early and convenient opportunities to make positive contributions	x				Great effort was made to ensure the seniors' outreach was early, frequent and accessible.
Citizens learn from planners and others a broader and deeper knowledge and understanding of their environment, its potential and its fragility		x			Environmental issues were stressed more, and appeared to be more relevant, for younger age groups, though seniors also appreciated the importance and interconnectedness of the local environment.

Standard	Good	Fair	Poor	NA	Comments
Individuals, interest groups and agencies are identifying their own positions, recognizing those of others and working towards a win-win solution co-operatively		x			The seniors' outreach process focused on bringing seniors together as individuals rather than as groups, with the exception of service providers representing various agencies (in Seymour).
Relationships between planners, politicians and other people are strengthened so that communication barriers are breached, and mutual trust increases as a foundation for communities to function more effectively in every way			x		Few seniors increased their contact with or understanding of the political process as the seniors' outreach process operated outside the general planning process (itself at arms length until plan adoption) and was then absorbed following its completion.

Source: Desmond Connor, *Constructive Citizen Participation: A Resource Book*, 1985, I-1, "Public Participation is Happening When..."

As detailed above, the evaluation of the research's public participation efforts results in a fairly good standing. For the most part, according to standards expressed in the literature, the methods used in the two cases scored 'fair' or 'good,' that is the focus group format used in Lynn Valley and Seymour did a reasonably good job of including seniors, seniors' issues, and seniors' perspectives in community planning efforts. Areas for improvement, vis-à-vis how suitable the research was in terms of public participation, include:

- increased ongoing involvement in both the local community planning process and the municipal political process;
- increased explanation, understanding, and discussion of the interconnectedness of community issues as well as increased focus on choices about resource allocation (notion of finite pie and need for prioritization);

- greater involvement in the 'pre-process' or goal setting and process development, including the ability to affect long-term change; and,
- greater representativity of the focus group as well as more involvement from established interested groups (especially in the Lynn Valley case).

The sections above have presented an analysis of the effectiveness of the seniors outreach process from three perspectives: the seniors involved, the District planners, and the facilitator-researcher. It has also evaluated the process from the perspective of the District's public participation guidelines as well as standards from the literature. The process has 'scored' reasonably well, that is, it was deemed reasonably effective from all of these perspectives. In addition, it has been indicated that the seniors' outreach process is a significant improvement over the regular public participation process, but that specific improvements could be made to render it even more effective. The next section explores some of the factors that influence the effectiveness of this process.

III. Factors Influencing the Effectiveness of the Seniors' Outreach Process

Given that the seniors' outreach process used in both the Lynn Valley and Seymour cases is a reasonably effective method of including seniors, seniors' issues, and seniors' perspectives in local community plans, it is important to understand what factors influence this effectiveness. That is, if we wish to achieve a specific outcome, namely effectiveness of a given seniors' outreach process, it is important to know what factors can affect this outcome and, ultimately, be able to control and manipulate these factors to achieve the most desirable outcome, namely,

maximum effectiveness. These factors, as described below, are the participant selection process, focus group logistics, resources allocated, the facilitator's skills, and participant bias.

1. Participant Selection Process

The first factor influencing the effectiveness of seniors' outreach for including seniors, their issues, and their perspectives in local planning relates to the process by which participants are selected to be consulted about planning issues. The reader will recall that in the two cases focus groups were held at locations and times where and when seniors were already congregating (seniors apartment complexes, churches, seniors centres, seniors' programs, etc.) with at least one very public session held in each case community. In addition, promotional materials were displayed in areas and media thought to be accessed by seniors, such as seniors' day at a local mall and community newspapers. This process could be construed as snowball sampling: the facilitator contacted groups she personally knew of or were recommended by known service providers. There were no arbitrary decisions on specific groups to exclude or include,²¹⁹ but rather all groups known or discovered through snowballing were encouraged to take participate in the seniors' focus groups. Since the invitation to participate was not distributed to all individual seniors residing in the case communities, the methods of contact used and the groups contacted certainly impacted which individual seniors participated in the focus groups. This in turn influenced the effectiveness of including seniors, seniors' ideas, and seniors' perspectives in the community plans: only certain seniors participated and therefore only certain ideas and perspectives were included. Broadly speaking, the method used to select participants in a seniors

²¹⁹ Fennel in Peace, 1990, 67.

outreach process will likely influence the effectiveness of that process, for example, in the inclusion of certain ideas, over others, in the resulting community plan.

However, there are several important mitigating elements to be presented here in regards to participant selection. In the first instance, the seniors outreach process, in including those individuals who are most alert to opportunities to participate and are most interested in participating, is very similar to general public participation processes. That is, just as it is difficult to reach and engage those residents who are not particularly interested in participating in local planning efforts, it is difficult for the seniors outreach process to reach and engage that type of senior. In that respect, the seniors' outreach process is in no way inferior to the general public participation process, and superior in that it directly targets older adults, their ideas, and their opinions. In the second instance, the fact that seniors and service providers who participate, being aware and involved individuals, may represent other seniors in the community better than a randomly selected senior who may not have thoroughly thought through seniors issues as they relate to planning and who may not be particularly interested in the development of their community. Thirdly, the seniors outreach process can, as in the Seymour case, include two important 'sub-outreach processes,' that is, for example, incorporate the viewpoints of residents of a care facility and of service providers serving seniors, thereby enriching the variety of opinion generated through increasing the variety of 'types' of seniors' opinions consulted.

2. Focus Group Logistics

This subsection examines how the logistics or set-up of meetings (focus groups) that involve seniors can dramatically influence the effectiveness of the seniors' outreach process. The reader

will recall that the literature review provided an overview of how the aging process effects communicating with seniors as well as basic principles for communicating with older adults to involve them in public participation efforts. Such basic principles have also been translated in the literature into specific practical guidelines for including seniors in local community planning efforts. The American Planning Association, in a report entitled "Planning for an Aging Society," provides a detailed list of recommendations for the participation of older adults in public meetings.²²⁰ Below, this factor is examined, with respect to how it influenced the specific seniors' outreach process used in Lynn Valley and Seymour: this is done against the variety of criteria required to positively impact the effectiveness of a seniors outreach process through appropriate meeting logistics.

²²⁰ Howe, Chapman and Baggett, 1994, 47-55.

Table 5.6 Recommendations for the Participation of Older Adults in Public Meetings

Standard	Done in Cases	Not Done in Cases	Consequences
Schedule some public meetings and hearings in neighbourhood or seniors centres	x		Publicly accessible locations and offers to assist with transportation can result in increased numbers participating.
Ensure that meetings are held during daylight hours as an alternative to evening meetings	x		Better accessibility can increase participation (though perhaps only to the seniors' process if the general process remains un-tailored to seniors' needs).
Ensure building and room accessibility	x		Keeping all locations universally accessible ensures a greater variety in the type of participant (holding some meetings in "semi-public" buildings such as churches or seniors apartment buildings may reduce participation from seniors from the public).
Provide open space in the meeting room for wheelchairs and other mobility aids	x		This increases participation by those with mobility issues, disabilities, illnesses, and health concerns, thereby increasing the variety of participants.
Ensure that meeting rooms have adequate acoustics and amplification		x	Noisy locations, or locations where sub-groups must meet in the same room, reduces participation by those with hearing impairments and can lead to frustration with the focus group process (and possibly reduced participation or decreased 'buy-in' to the focus group results).
Limit meeting length to 1.5 to 2 hours and allow breaks to move about	x		Longer posted hours deters individuals with health concerns while running meetings over the posted time can lead to anxiety and frustration for participants.
Establish procedures on how the meeting will be conducted, explaining these at the start of the meeting	x		Outlining the agenda in publicity and introductory remarks allows for forethought on the topics to be discussed and therefore clearer and more detailed opinions.

Standard	Done in Cases	Not Done in Cases	Consequences
Honour the past by allowing time for reminiscences as part of the process		x	Reminiscences can provide important information on needs and opinions. This method can place participants at ease and thereby increase their honesty and the ultimate accuracy of the information provided.
Ensure that audiovisual presentations or handouts are appropriate to the audience.	x		Written materials can help keep the focus groups on track to achieving their goals.
Be an active listener	x		Requesting clarification as required and summarizing issues after they're raised helps keep focus groups on topic and productive.
Give feedback or use other means to monitor and evaluate if the meeting achieved its objectives.	x		Questionnaires can provide data on participants' feelings about the effectiveness of the focus groups.

Source: Howe, Chapman and Baggett, 1994, 47-55.

The processes used in the two cases in many instances met guidelines (see Table 5.6) suggested to increase the effectiveness of seniors' participation in meetings, and hence in a seniors' outreach process. Areas for improvement in the specific cases studied include: more daytime meetings for the general local community planning process, reduced ambient noise in meetings, displayed written guidelines for participation in discussion, and improvements to the evaluation questionnaire (as noted in the preceding section on questionnaire evaluation).

3. Resources Allocated

A third factor influencing the effectiveness of the seniors' outreach process studied here is the availability or accessibility of resources. That is, due to the lessened availability of certain

resources or due to reduced, difficult, or highly regulated accessibility to certain subgroups of seniors (e.g., in care facilities) or due to easily accessible pre-formed groups, a facilitator may unconsciously put less effort into situations that require a great deal of resources to acquire a small percentage of seniors in favour of accessing 'easier' groups. Given the snowball nature of the sampling process, this held true, for example, in at least two instances: more generally, large seniors' apartment complexes were automatically included as potential focus group sites (whereas not all smaller complexes were), and more specifically, one particular group might have participated if they had been given more encouragement.

In the first instance, it is relevant to mention the importance of measuring the provision of adequate resources to special outreach processes if the commitment exists, as it appears it does here, to implementing them. In both the cases studied here, very little additional money was spent on the seniors' outreach: an internship position and volunteers provided the bulk of the resources in the Lynn Valley case, while a small contract and some staff time brought about the Seymour forums. This may have, internally, given the impression that the seniors' outreach processes were indeed just a sidebar to the much more important general planning process, being run by established senior planners. However, this impression, if it existed, likely remained internal to District Hall and, as it does not seem to have impacted the inclusion of seniors' issues in the Lynn Valley case, perhaps it will not influence the Seymour situation either.

A related point to the discussion of adequate resource provision revolves around the importance of using cost-benefit analysis as an extension of evaluative mechanisms.²²¹ As one author puts it, "...the economic resources of any given society that are available to the elderly are limited and

have alternative uses for society with varying degrees of value (benefit). Thus, if planners and decision makers are to make the best use of these resources, they must allocate them in such a way as to maximize the benefits or values of the outcomes for any given amounts of resources available to them.”²²² While the amount of money directly expended to effect the seniors’ participation process may be small, it would be worthwhile, first, to compare the resources used to the amount required to implement a *different* form of seniors’ outreach and, second, to view seniors’ processes as consuming resources forgone by other existing or potential projects. In both cases this can be a difficult comparison. In the first instance, similar results might be achieved through such means as a mailback questionnaire (likely much more expensive) or selected key informant interviews (much less expensive). In the second instance some staff resources (for example, used in compiling information) could indeed be freed for other projects, but it is debatable, for example, whether contract monies spent on a facilitator in the Seymour case could have been ‘spent elsewhere’: all other special outreach processes (such as for youth or persons with disabilities) were completed, leaving one to assume that seniors’ outreach did not take away from other special outreach for the plans. In addition, resources spent on outreach would likely only be spent on the general local planning process for each community, where their addition would provide marginal benefit to an already well-resourced process. In sum, it should be safe to say that for a small amount of resources spent (or forgone), a significant impact can be and has been achieved.

²²¹ Challis and Darton in Peace, 1990, 76.

²²² Greenberg in Mangen and Peterson, 1984, 317.

4. Facilitator's Skills

This section briefly examines the strengths and weaknesses of facilitators in involving seniors in community planning. By way of an introduction, the two figures below provide excerpts, from a participant observer perspective, from the final reports of the "Seniors and the Lynn Valley Plan" focus groups and the "Seymour Local Plan Seniors' Forums."

Figure 5.3 Excerpt from "Seniors and the Lynn Valley Plan" Final Report

"Individual comments as to the usefulness of the discussion groups as well as the effectiveness of the facilitator, internship student Annwen Rowe-Evans, were certainly encouraging....Challenges included: presenting large amounts of detailed and complicated material in a straightforward and succinct way; acquiring knowledge on the wide variety of issues touched upon in the Plan; effective time management during the discussion group; proper facilitation of the discussion; discouraging participants from monopolizing and encouraging quieter voices to be heard; and, active listening and probing. The repetitive nature of the discussion group series allowed for a steep learning curve over a short period of time, and many of these challenges quickly became lessons learned."

Figure 5.4 Excerpt from "Seymour Local Plan Seniors' Forums" Final Report

"Several lessons were learned from the Seymour Local Plan Seniors' Forums. The most successful Forum in terms of number of participants was scheduled to follow on from a Keep Well program at Mt. Seymour United Church: with a large number of seniors already on location, attendance was much higher than in the independently-organized sessions. Wherever possible, this tight tie-in should be made in the future. A second lesson involves the addition of a Forum for agencies that provide services to seniors, something that was not done in the Lynn Valley Plan seniors' outreach project: although opinions expressed can not be directly equated with the experience of local seniors, service providers perspectives can provide a more analytical viewpoint that covers Seymour and the North Shore."

These excerpts from the final case study reports highlight a number of successes and difficulties for a facilitator that can be grouped into the three general categories found in the literature (as discussed in the previous chapter). In the first instance, the facilitator needs to practice good

facilitation skills, to promote understanding and lead the group towards decisions on the issues at hand. This is reflected in using appropriate techniques to present detailed and complicated material in a straightforward and succinct way as well as time management during each session, facilitating the flow of the discussion, and moderating viewpoints by encouraging quieter participants to voice their opinions. In the second instance, data gathering and assessment skills are required, in order to help the facilitator to understand seniors' needs and concerns through opinions and information provided. This includes summarizing material for participants, partializing information (breaking down the information presented into manageable sections), and effective questioning and probing. In the third instance, the facilitator has to use action skills to accomplish the goals of the focus groups, including promoting full understanding of the issues and guiding interaction between participants. Putting these skills into practice can help result in a better understanding of the issues by participants, more clearly defined opinions on issues, and a wider variety of opinions, if not more.

In addition to the skills suggested by the literature (facilitation, data gathering/assessment, and action skills), the facilitator of the two cases studied here found a need for another underlying skill: the ability to adequately and effectively inform oneself about the local context. This can involve preparatory work, such as acquiring knowledge on the wide variety of issues included in the plans as well as learning about and coordinating with local senior-oriented groups. It also entails including those individuals who themselves had internalized a great deal of information about the local context: for example, the Seymour Local Plan Seniors' Forums wisely incorporated a focus group session of service providers who work with local seniors.

Over and above these more definable skills, the facilitator's personal and philosophical approach to the outreach process is also relevant to the process' effectiveness. In general terms, the active and ongoing recognition of personal bias and its impact greatly reduces such bias during the process. Ongoing education about the nuances of facilitator bias is also recommended. The facilitator found one specific method to be very useful during the research process in keeping an eye on potential bias, namely 'intervening with sensitivity to diversity,' including:

- employing a strengths perspective, i.e., highlighting strengths inherent in diverse backgrounds thereby facilitating trust and more meaningful group interaction;
- acknowledging and exploring similarities and differences in participants' backgrounds and helping overcome barriers to participants' self-disclosure;
- clarifying the meaning of cultural behaviour (thereby supporting individuals' perspectives and contributions as valid);
- challenging prejudice and discrimination by emphasizing values of tolerance, respect for the worth and dignity of all, and the importance of maintaining a non-judgemental attitude; and,
- advocating for members in situations outside the group.²²³

5. Participant Bias

Although not always at issue in planning research, the factor of participant bias is relevant to the effectiveness of the seniors' outreach process, that is, the biases of the participants as older adults greatly impact on the outcomes of the focus groups. The aging process as well as generational

²²³ Toseland, 1995, 63-65.

factors can lead to a certain amount of, often unintentional and invisible, participation bias. This bias centres on a host of important issues:

- obvious or hidden sensory impairment, or other health or functional deficit (e.g., vision or hearing losses), leading to misunderstanding and/or confusion;²²⁴
- lack of familiarity or instruction in newer methods (such as open-ended questionnaires or multiple choice answers);²²⁵
- selective forgetting of questions or possible responses (and the associated stigma of memory loss);²²⁶
- researcher-participant incompatibility, due to difference in age, race, gender, etc. and related lack of rapport and reduced comfort with answering honestly;²²⁷
- fear of environmental change or pressure through their opinion (e.g., care facility);²²⁸
- evasion of sensitive or socially (generationally) inappropriate topics, for example in order “(1) to shield themselves from the realization that they are not meeting their own standards, (2) to avoid the embarrassment they would feel if others knew, or (3) to prevent others from punishing them (that is, ridiculing or criminally persecuting them);”²²⁹ and,
- the general human trend towards positive response bias, namely providing what they think researchers want to hear (due to ego defence, social appropriateness, etc.).²³⁰

²²⁴ Carp, 1989, 97; and McAuley, 1987, 181.

²²⁵ Carp, 1989, 99-100.

²²⁶ Carp, 1989, 99-100; and Abrahamson, 1983, 350.

²²⁷ J. Donahue, “Relationship of Age of Perceivers to Their Social Perception,” *The Gerontologist*, 5, 241-246, 1965 in Carp, 1989, 115; and McPherson, 1990, 122.

²²⁸ Lowy, 1985, 279.

²²⁹ Abrahamson, 1983, 356

²³⁰ Carp, 1989, 101, 103-105.

The most relevant point to be made here is that any one or more of these factors could be in play at any given time in a community, affecting both the policy outcomes and the effectiveness of the outreach process, with little researcher ability or opportunity to assess any causal impacts.

IV. Conclusion

This chapter has provided the reader with the results of the thesis research by means of an evaluation of the effectiveness of the seniors' outreach process. In the first instance, the perspective of the seniors involved, the District planners, and the facilitator-researcher were used to analyse the effectiveness of the Lynn Valley and Seymour process. Then, an evaluation was performed from the perspective of the District's public participation policy and participation guidelines from the literature. The findings suggest that the focus groups process was on the whole suitable to seniors' abilities and constraints, satisfying to the seniors involved, and effective in producing useful information, likely more so than simply offering them opportunities to participate in general planning processes not specifically tailored to their needs. This chapter identified a number of factors that appear to influence the effectiveness of the seniors' outreach process, including participant selection process, focus group logistics, resource allocation, facilitator skills, and participant bias. That is, we now know of a number of possible manipulations planners can make to enhance the effectiveness of seniors outreach. On the basis of these findings, the final chapter offers a set of guidelines for producing effective seniors' outreach processes.

Chapter 6: Conclusions

This thesis has investigated the process of involving seniors in local community planning. Relevant literature from several fields has provided an overview of current knowledge on this topic while two cases of an outreach process involving seniors were evaluated in light of the literature and analysed to determine the factors influencing process effectiveness. This chapter will now provide some concluding comments stemming from the research performed. It will, firstly, answer the research questions posed in the introductory chapter. It will also discuss the importance and relevance of the research results, including implications for planning theory and practice. Finally, it will offer some suggestions for future research in this area.

I. Research Questions Answered

In the first chapter of this thesis, the researcher posed three questions, questions that were to be answered through the research performed. The answers to these questions are provided on the basis of the case study results contextualized by the information from the literature.

The first research question asked “Why is including seniors, seniors’ issues, and seniors’ perspectives in community planning efforts important and relevant?” This inclusion is both important and relevant to public participation processes in community planning for a variety of reasons. In the first instance, inclusion is important for accurate planning. For example, the outreach process studied in the two cases resulted in a more detailed understanding of local seniors needs, responses to which were included in the plans. Seniors, on the whole, know and

understand their individual needs, needs that may be quite different from other population groups or even other seniors. A full understanding of the needs of all members of the community, including seniors, will result in more accurate planning and, hence, healthier communities. With increasing numbers and demographic proportions of seniors, as well as increasingly different health and lifestyles for today's seniors (in comparison with past generations of seniors), accurate planning for seniors' needs becomes increasingly important. In the second instance, inclusion is important for improved acceptance of the planning result: increased participation of community residents results in a higher probability of plan acceptance by the community.

Although difficult to prove that seniors show increased plan acceptance at this stage in the Lynn Valley and Seymour plans' development, seniors (according to the participant questionnaires) better understood the plans and approved of the outreach process that included their opinions in the plans. In the third instance, inclusion and participation are relevant as both a democratic right and a duty. Our political traditions have inculcated a societal value of fair representation: individuals, groups, and communities have a right and a responsibility to participate in making decisions about what affects them. Finally, although less directly central to the purpose of community planning, inclusion promotes self-sufficiency and self-worth in individuals and communities: it promotes the personal development of individuals and the health and progress of communities. The creation of the Lynn Valley Seniors Association, a community organization dedicated to improving social and recreational opportunities for local seniors and to creating a presence for seniors in the community, certainly demonstrates this.

The second research questions posed was "What are the circumstances under which seniors are most likely to become involved in community planning efforts?" The simple answer to this question is, of course, "When they feel included." However, this question demands a more

detailed response. First, seniors are more likely to become involved when they feel they are fulfilling a meaningful role, that is, when they are looking for purposeful activities, when they are wanting to contribute their expertise to an issue, when they want to feel helpful to and accepted by the community, and so on. Second, seniors are more likely to involve themselves when certain emotional needs are satisfied by the process: when they feel they have a personal stake in a given issue, their contributions are deemed valuable, the process provides a sense of fulfillment, the learning environment is safe and manageable, they are able to socialize, and so on. Third, seniors are more likely to participate when they are able to access participation opportunities, that is, when aging-related needs such as sensory changes, memory loss, or mobility difficulties are taken into account or, in other words, when the particular process, as discussed below, responds to their needs. When a significant number of these factors is present, then seniors are most likely to become involved in community planning efforts. The cases studied here demonstrate the importance of such factors as appropriate meeting logistics and participant intake processes in encouraging the participation of local seniors in planning efforts. It should be noted that public participation processes have often proven too general to effectively include seniors (who may be isolated or feel less competent than other residents), and that an effective outreach process specific to seniors is highly recommended.

The third and final research question asked "What practical process can be used to encourage effective seniors' participation in developing local community plans?" This thesis has established, through the evaluation of two cases, that the seniors' outreach process employed in Lynn Valley and Seymour is a suitable practical process for encouraging seniors' participation in community plan development. This said, there is a basic set of recommendations that can be extrapolated to form a checklist for future outreach processes. This list is derived from the two

case experiences, as analysed for effectiveness in this thesis, in the context of the knowledge from the literature. Such recommendations include:

- ***support from municipal policies, council, and staff***
 - meeting the requirements of any municipally-determined guidelines for participation processes
 - securing ongoing support and objectives from council and planners
 - ensuring adequate resources that are proportional to the rest of the participation process
- ***involving seniors in the design and implementation of the outreach process***
 - ensuring seniors' input into establishing the process, its goals, and its methods
 - properly defining agendas
 - establishing procedures on how the meeting will be conducted
 - providing adequate means to input into the plan, such as representation on the planning team by a seniors advocate or allocation of time in regular meetings for presentation and discussion of seniors' issues
 - involving seniors in reviewing draft plans
 - encouraging ongoing input by the seniors community, including the formation of new seniors groups
- ***engaging a skilled and committed facilitator***
 - explaining the nature of what is to be planned as well as well-supported summaries of possible issues at hand
 - promoting intra-group understanding and leading the group towards decisions on the issues at hand through good facilitation
 - active listening by the facilitator

- good data gathering and assessment skills as well as community knowledge on the part of the facilitator
- establishing key roles (e.g. convener, facilitator, recorder)
- including full seniors' process documentation in collated planning materials (for plan preparation)
- *publicizing the process and its results*
 - ensuring informative publicity that reaches as much of the seniors community as resources will allow and as early as possible
 - evaluating meetings and focus groups, with well-structured questionnaires for participants and built-in reviews by planning staff
 - reporting results to the seniors community and the community at large in a timely and accessible fashion
- *accessibility of the process and focus groups*
 - limiting meeting length to 1.5 to 2 hours and allowing breaks to move about
 - allowing opportunities for 'newcomers' to input during or late in the process
 - allowing time for reminiscences as part of the process
 - preventing domination of the process by a single group or individual
 - locating focus groups where and when seniors already congregate
 - using daytime, not evening, meetings
 - ensuring building and room accessibility for those with mobility difficulties
 - ensuring adequate acoustics and amplification
 - ensuring appropriate (e.g. large print) audiovisual presentations or handouts
 - ensuring adequate and convenient transportation

- *including seniors service providers in the process*
 - including service providers involved in delivering services to seniors (and possibly family members of seniors or non-seniors extrapolating their futures as seniors) in a separate focus group

Given this list of recommendations, it is worthwhile noting which of them fall into the following categories: recommendations provided in the literature but not examined through the case studies; recommendations provided in the literature and examined through the case studies; recommendations not provided in the literature (to my knowledge) but uncovered through the case studies. They are as follows:

- *recommendations provided in the literature but not examined through the case studies*
 - allowing time for reminiscences as part of the process
- *recommendations provided in the literature and examined through the case studies*
 - *support from municipal policies, council, and staff*
 - meeting the requirements of any municipally-determined guidelines for participation processes
 - securing ongoing support and objectives from council and planners
 - ensuring adequate resources that are proportional to the rest of the participation process
 - *involving seniors in the design and implementation of the outreach process*
 - ensuring seniors' input into establishing the process, its goals, and its methods
 - properly defining agendas
 - establishing procedures on how the meeting will be conducted
 - involving seniors in reviewing draft plans

- encouraging ongoing input by the seniors community, including the formation of new seniors groups
- ***engaging a skilled and committed facilitator***
 - explaining the nature of what is to be planned as well as well-supported summaries of possible issues at hand
 - promoting intra-group understanding and leading the group towards decisions on the issues at hand through good facilitation
 - active listening by the facilitator
 - good data gathering and assessment skills as well as community knowledge on the part of the facilitator
 - establishing key roles (e.g. convener, facilitator, recorder)
- ***publicizing the process and its results***
 - ensuring informative publicity that reaches as much of the seniors community as resources will allow and as early as possible
 - evaluating meetings and focus groups, with well-structured questionnaires for participants and built-in reviews by planning staff
- ***accessibility of the process and focus groups***
 - limiting meeting length to 1.5 to 2 hours and allowing breaks to move about
 - preventing domination of the process by a single group or individual
 - using daytime, not evening, meetings
 - ensuring building and room accessibility for those with mobility difficulties
 - ensuring adequate acoustics and amplification
 - ensuring appropriate (e.g. large print) audiovisual presentations or handouts
 - ensuring adequate and convenient transportation

- *recommendations not provided by the literature but uncovered through the case studies*
 - allowing opportunities for 'newcomers' to input during or late in the process
 - including service providers involved in delivering services to seniors (and possibly family members of seniors or non-seniors extrapolating their futures as seniors) in a separate focus group
 - locating focus groups where and when seniors already congregate
 - providing adequate means to input into the plan, such as representation on the planning team by a seniors advocate or allocation of time in regular meetings for presentation and discussion of seniors' issues
 - including full seniors' process documentation in collated planning materials (for plan preparation)
 - reporting results to the seniors community and the community at large in a timely and accessible fashion

Using the process employed in the Lynn Valley and Seymour cases as a basis, the fulfillment of as many of these recommendations as possible will result in an effective practical process for encouraging effective seniors' participation in developing local community plans. This said, there are costs and priorities to be considered in this list of recommendations.

Costs would likely include: staff or consultant time (including an appropriate facilitator and questionnaire designer), accessible space for focus groups, appropriate publicity, and reporting of results. Another less direct 'cost' might involve extending public participation timelines to allow for the time required to perform a seniors' outreach, especially if this outreach process is extensive and concerned with including 'hard to reach' participants such as isolated frail elderly

living in their homes or family members and caregivers of older adults. However, the process used in the two cases demonstrated that a reasonably effective outreach process can be implemented at a relatively small monetary cost to the municipality.

There should also be some consideration of the prioritization of these recommendations. This will, naturally, depend on the philosophy and resources of the municipality and community involved. However, categorizing the recommendations as presented above will allow planners and communities to recognize the importance of the following facets of seniors' outreach and develop their own priorities within and across the categories.

Finally, it should be noted, though perhaps obvious, that the ultimate goal of participatory planning is to be completely inclusive of all population groups at all times. That is, planning should work towards eventually doing away with special seniors' outreach processes by making the participatory processes more inclusive of seniors (and others). For the time being, planners should consider employing a seniors' outreach process, all the while increasing inclusivity in the regular participatory process.

II. Importance and Implications of the Results

The case processes and thesis research presented here are important and have implications for planning theory and practice. In the first instance, the process and research results could be important in modifying municipal planning policies with regards to public participation. The participation generated by the seniors' outreach process demonstrated that there was a demand for opportunities to contribute seniors' issues and perspectives to the development of community

plans. The impact of the information and opinion gathered on the plans themselves demonstrated the effectiveness of the outreach process. And both the participation and its impact on the plans have helped introduce a possible precedent for using this process in future District community planning, and through future dissemination of the guidelines derived here, possibly in neighbouring municipalities.

In the second instance, the research results have implications for planning knowledge and theory. The literature review performed here has demonstrated that there exists little written information about the intersection of community planning and social gerontology, in particular as regards seniors' participation in planning efforts. This thesis helps add to the inherent multidisciplinary of community planning and suggests additional gerontological resources for planning knowledge and the study of public participation to draw on. Also, knowledge and practice of public participation can be improved by the examination of how individual population groups are included: methods of public participation are more truly participatory with the addition of information about increasing inclusiveness derived from seniors' outreach.

Finally, the thesis research suggests a wide variety of implications for planning and public policy practice. It presents a need, a precedent, an importance, and a relevance to including seniors in public participation efforts. The relative inaccessibility of regular processes to seniors, the reasonable success of the seniors' outreach process used here, and the recognition of the imperative for active inclusion have resulted in the provision of practical and reproducible processes, methods, and techniques for increasing seniors' participation. Even small but significant changes in staffing, knowledge, behaviour, procedure, and policy enhancing inclusion in municipal politics and bureaucracy, could have dramatic effects for seniors in the community.

III. Suggestions for Future Research

It has already been indicated above that there is a dearth of theoretical and practical knowledge at the intersection of community planning and social gerontology, in particular as relates to seniors' participation in local planning efforts. First, further study should be given to the process used here and processes like it. If a larger number of cases could be studied and compared, a further refined process (or checklist for building a process) could be established and profitably employed and tested in yet more cases. Second, attention should be paid to possibilities for longer-range planning of seniors' needs: given the demographic surge of seniors that is fast approaching, processes should be developed to help identify and plan for future cohorts of seniors. Both a greater number of cases and longer-range planning would help reinforce the importance of including seniors in community planning. Finally, if this process is necessary and effective for the seniors population within a community, it would seem wise to further study the possible exclusion of other groups, such as youth or small business. Conversely, literature covering outreach experiences with other population groups could also be consulted and analysed as it relates to seniors' outreach models and seniors' participation in planning. If community planning can continually refine and improve public participation then seniors, and in fact all groups and individuals, can fulfill their right and responsibility to making our communities healthier, happier, and more effectively planned.

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