

Communities For a LIFETIME

Preparing for All Generations

A strategic planning project for the future of

Steele County, MN



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Executive Summary

Background

The county government in Steele County, Minnesota has undertaken a comprehensive review of its resources and future needs for the aging of its population over the next decade in order to create innovative responses to an increasingly challenging and changing economic reality. Initiated in October of 2006, the County engaged Consultants for Community Resources and Maturity Mark Services Co. to undertake the first phase of this project to include:

- a demographic analysis of the County's 50+ population using proprietary market analysis software from Project Market Decisions, Inc. which provided a 10-year projection of trends within the County on a variety of socioeconomic and demographic variables;
- discussions and interviews with key individual and group stakeholders in the community including municipal, county, and state government representatives, businesses, faith-based groups, service agencies, ethnic minorities, and citizen groups throughout the County;
- an initial asset map of individuals, associations, and organizations within the County using principles and tools developed in conjunction with the asset based community development Institute at Northwestern University;
- a county-wide visioning conference involving representatives from every sector of the various communities in the process of identifying the capacities of and challenges facing Steele County in the next decade.

Steele County Department of Human Services assembled an Advisory Committee representing 12 major service and county organizations which met regularly to provide guidance to the project's aims, activities, and direction and to ensure representation for each local communities needs.

Despite being a rural County, Steele County has an interesting mix of small and large municipalities within large tracts of surrounding farmland, as well as a base of manufacturing and service businesses within a primarily agricultural community. Similarly, a majority of the County's population resides within the boundaries of its largest municipality, Owatonna. Many smaller municipalities endeavor to maintain a unique identity within the context of the need for Steele County government to provide countywide services.

Major findings

The demographic analysis revealed the unique population trends that Steele County will experience over the next decade through projections on a county, municipal, and census tract basis. In particular, it identified that by the year 2011 more than 25% of Steele County's population will be over the age of 55 and that it will experience a rapid increase in the number of households age 50 through 69. At the same time, the number of households with those aged 75 through 84 will experience some decline. Beginning in 2015, these trends will begin to moderate and by 2020 the County will experience a rising 75 plus population. The analysis also revealed that the northern part of Steele County including Medford and northern sections of Owatonna will experience somewhat stronger growth in its 50 plus population than in other parts of the county.

The 50 plus population contributes significantly to the economic foundation and growth in Steele County over the next decades. Annual household income alone for this age group is expected to rise from \$389 million to \$563 million by 2016. This represents a median income that is 8% to 12% higher than the United States average. Median home value for 55 plus households is expected to rise from \$147,464 in 2006 to \$173, 559 and 2016.

Early discussions identified some major common issues to be addressed during the course of the project. These included health and wellness, transportation, housing, partnership activities, intergenerational projects and programs, and civic engagement. Extensive community meetings with local residents, municipal officials, service providers, businesses and large employers, health care providers, and faith-based organizations identified and refined the implications of these issues within the local community. The asset mapping process also identified an abundance of individual and organizational assets which could be brought to bear at the local level.

While each community brought its own unique perspective to these issues and the responses to address them, it was also apparent that broader cooperation, more coordinated partnerships between agencies in the community, and county-wide initiatives would enhance the ability of all these agencies to respond most appropriately to changing demographic realities. For example, despite the perception that Steele County would potentially require significant expansion of senior housing resources it became apparent from the demographic analysis that it is already well situated to respond to its 65 plus population requiring assistance with activities of daily living. Additionally, affordability issues become more significant when the typical cost of current assisted living can be well beyond the means of many county residents. Almost 39% of the 65+ population live in single person households, potentially requiring in-home or assisted living services, and 51.4% of 65+ residents have annual household incomes below \$36,000, the typical minimum cost of assisted living community rent and services.

The mapping process also revealed that local communities potentially have resources among its local citizenry to help address the issue of transportation assistance. Generally, the local Steele County Area Transit (SCAT) transportation system was regarded as adequate. However, locally arranged neighbor to neighbor services for medical appointments, shopping, and in formal travel were also identified as a possible resource that has not been fully exploited. This and other information resulting from the project should encourage the County to engage all local service providers in a reevaluation and reassessment of how to most effectively organize and coordinate their services both among themselves and in conjunction with local resident based community assets.

Information from the project also identified that the County has made progress in addressing service gaps and needs identified within the last few years. Even though the project was not directed at evaluating the continued response to the 2001 - 2003 gap analysis, the information gathered by both the demographic analysis and asset mapping process indicates that the project will result in revealing additional resources to address needs identified in the gap analysis process.

Major Recommendations

1) The Partnership Project governance structure should be adopted as recommended by the workgroup during the Communities for a Lifetime Visioning Conference.

The project structure and governance defined by the Partnership workgroup during the Communities for a Lifetime Visioning Conference should serve as the basis for future project organization and governance. It is of critical importance that the project governance be located outside the Steele County government, but with its participation. The structure must have a governing board and look into the possibility of using a “working” committee structure to develop overall programming and address the multiple community action tasks uncovered during the Visioning Conference and new issues that will inevitably arise. Representation may include local service agencies, major healthcare providers, funding agencies, local Chamber of Commerce, Steele Co. Human Services, Planning Dept., all municipal governments, Community College, and other sectors as appropriate. The leadership should be elected by the members and the task agenda established based on the necessary priorities of the community. A recommended possible governance organizational structure layout is included in a later section of this document.

2) Steele County should continue to encourage consolidation of services operating on a county-wide basis so that it can plan and deliver activities and services to appeal to baby boomers and young seniors.

Certain of Steele County's service organizations clearly deliver specific services to a county wide constituency, however these groups can also benefit from reduced overlap and consolidation of both physical space and staff as they move ahead to provide services to Steele County's 50+ population. The framework for continuing to encourage consolidation is to minimize geographic and service delivery overlap and redundancy so that needed additional attention can be directed to services by these agencies that will appeal to more 55-69 year olds. It is not unusual for service agencies to expand their activities and geographic coverage as they pursue funding and financial resources. However, this also often takes the agency beyond its original mission, and more importantly, beyond its core competencies. A recommended part of the consolidation and support from project funders should be for these agencies to engage in a review and clarification of their core competencies and guidelines to minimize or mitigate unnecessary overlap of services. Agencies that adopt progressive and innovative programs, which engage in coordinated service delivery efforts, best practice models, and expanded partnerships with other local agencies should be eligible for financial incentives from the County, and other funders, to do so.

3) Steele County should, as a priority, explore centralizing service locations using existing infrastructure to consolidate service providers.

A centralized service location for all or multiple service providers lends itself to significant cost reduction for infrastructure and maintenance, as well as creating a one-stop shop for meeting the various needs of the aging population. Options that could be considered but are not limited to are the following: 1. Potential availability of the soon to be vacated hospital space; 2. Look into possible expansion of Senior Place's existing facility; and 3. Pursue possible options with the development of the new medical campus; keeping in mind the ongoing need for satellite program sites (not administrative) in Ellendale, Blooming Prairie, and Medford.

4) All senior service providers should continue to expand its programs and services, particularly to include minority and ethnic populations within the County. Additional program locations should be established in other areas of the County in partnership with other organizations.

For example, one agency Senior Place, given its centralized location, is well situated to continue to provide its very well regarded standard activities and programs to seniors in the community and county-wide if at all possible. There is also an opportunity to potentially expand its services and become a more prominent resource for the significant Hispanic and Somali ethnic populations in Steele County. Although the numbers are relatively small, outreach by the Center and the community providers would significantly enhance the delivery of services to these County residents. Reaching out to partners with the established representative organizations such as Centro Campesino and Somali Self Development Organization will be a critical piece to establish buy in by these organizations and tailor services to their constituencies.

5) Steele County's local business and large employer community should be further and more directly engaged in the Communities for a Lifetime project. Local employers should also be encouraged to employ older workers beyond traditional retirement and be made aware of the reasons for this initiative.

The business community responded very positively to the information about Steele County that the project provided. It was also clear that there are employment issues, particularly the potential scarcity of

new entry level workers, in which the county's older citizens could be both a resource and potential solution. A primary task of the Communities for a Lifetime Partnership Committee should be outreach and inclusion of the business community. The business community should be encouraged to develop ways to employ older workers beyond traditional retirement for their own benefit as well as the community's; this could include flexible work hours, restructuring benefits packages, new roles in employee mentoring, training, etc.

6) The process of refining issues, community assets, and mobilizing response must be brought to the local community level.

The process begun with the Visioning Conference must be brought to the municipal and local neighborhood level for community impact and change process to begin. The use of "charettes" or other community response mechanisms is strongly encouraged, as well as local "Visioning Conferences" using an action analysis approach to approach those local issues.

7) The asset mapping process begun during the Project's third month should be continued with next phase efforts concentrating on businesses and communities of faith.

The asset mapping process begun during the Project's third month should be continued with next phase efforts concentrating on businesses and churches. The original asset mapping efforts were preliminary, and the next phase of the project should yield a far larger and more specific accounting of the gifts individuals and organizations may give to the county. This process will yield significant benefits including the identification of additional assets that may be included in the Project's central activities.

8) The Project Partnership Committee should reconvene the Visioning Conference working groups to continue their work on the issues raised during the Conference. Assets discovered during the asset mapping process should be explicitly attached to each work group's recommendations.

The asset mapping process has yielded significant assets available to the Project for the implementation of the Visioning Conference recommendations, as well as efforts undertaken in the future. This can be accomplished in a number of ways:

- Match the responses of those individuals and organizations to the "assets needed" portions of the action analysis in each area;
- Contact each individual and organization interviewed and identified to ascertain their willingness to participate further in the projects. During those follow-up contacts identify actual ways in which the identified gifts can be used;
- Create an asset data base, utilizing the data already collected and make that data base available to the project work groups.
- Solicit the participation of individuals and organizations in the continuing asset mapping effort in the County

9) The Project Partnership Committee should focus attention on the development, expansion, and changes in caregiver support services based on the demographics reported during phase one of the Project, as well as national, state and local trends.

Steele County's growth in the 50-64 year old age cohort indicates a concurrent growth in caregiving, as national estimates provide information that approximately 25% will provide caregiving services to an older relative. In reviewing the 2007 Children and Community Services Act (CCSA) requests for funding from the county by local service agencies, many services were very similar in terms of services and target populations. Often, these services were in close geographic proximity, generally offered similar services, and required support for separate staff and infrastructure. This makes it absolutely

necessary to ensure that service duplication is avoided both in terms of types of services and overlapping service areas, and that efficiency and effectiveness criteria be established and receive oversight.

10) Based on demographic projections, it is the opinion of the project principals that Steele County has adequate nursing home and assisted living capacity for the next 5-10 years, based on the demographic data summarized below. There is a need, however, to develop additional affordable assisted and independent living options, which may not include the construction of additional assisted living beds. The County should also pursue alternative long-term care approaches which include additional caregiver supports potentially including adult day care and community based services for older adults.

The recent addition of assisted living and other congregate care facilities has done a lot to address Steele County's existing need for these services. Consumer demand may continue and this status should be reviewed regularly to ensure adequate planning and response. The County should pursue extension of other local home- and community-based personal care / health care services and expanded caregiver support, respite care, and local initiatives.

One of the objectives accomplished by the *Communities for a Lifetime Project* is to provide Steele County and its residents with the tools and opportunities to prepare itself for the future of its aging population. This future will include a growing population of 50-65 year old adults and the aging in place of older adults already in residence.

11) In order to properly serve the aging population the Project Partnership Committee must engage the municipalities and Steele County government to address planning, zoning and other infrastructure needs surrounding current and planned developments which may house older adults. This approach should include a thorough review of Smart Growth principles along with efforts to ensure the affordability of housing for older adults in Steele County.

Development pressures inevitably build when there is a perception of increased need for active adult and service enriched housing for older adults. Steele County will inevitably face these same opportunities, especially a decade and more from today. The context of Steele County's demographic trends over the next decade should be kept as a constant guidepost for considerations about future development. County and municipal governments will serve their citizens well if they take full advantage of and institute policy which includes smart growth, active aging, "green" building, and universal design concepts.

Methodology

The Communities for a Lifetime Project is divided into two phases. During Phase One, which is the focus of this report, the project principals, along with the Director of the Steele County Department of Human Services, the Communities for a Lifetime Project Advisory Committee and dozens of volunteer "asset mappers" collected and analyzed critical data to prepare Steele County for the future and engaged the organizations charged with providing services and opportunities to older adults for this future. Within Phase One the project principals undertook a commercial-grade demographic analysis which pictured Steele County as the developer of its own future.

Phase Two, which is yet to be implemented, is designed to put networks, programs, opportunities and services in place at the local level to carry forward recommendations and decisions to make Steele County an inviting, responsive and supportive place for boomers, older adults, and citizens of all ages to reside and prosper.

Phase 1

1) Demographic data collection – This component involved the use of proprietary market analysis software to provide a wider array of data than is typically available from standard census data, and a deeper and more accurate projection of Steele County’s aging demographics for the next decade. CCR and Maturity Mark Services Company (MMS) provided a comprehensive demographic picture of Steele County's current 50+ population, provided information about current trends in population, income, assets, housing, and trends of selected service needs. The analysis provided an accurate, commercial-grade projection for Steele County from 2005 – 2016, going beyond the standard demographic information and analysis typically available.

2) Business partnership analysis -- Utilizing visits with the Steele County Chamber of Commerce, and gatherings of Steele County’s major realtors, senior housing providers, and major employers CCR and MMS worked to develop an analysis and recommendations to create a clearer picture or asset map of potential public/private partnerships between the business community. A list of all meeting attendees is available in the appendix. CCR and MMS also met with a group of four retired business executives as part of this effort. In addition CCR and MMS met with State Senator Dick Day and State Representative Connie Ruth as part of these meetings.

3) Analysis and assessment of Steele County Senior Services providers -- Using site visits, focus groups and individual interviews CCR and MMS met with all of Steele County’s Senior Service and Human Service providers, a list of all meeting attendees is available in the appendix. These meetings analyzed the current service delivery activities, future potential and recommend specific changes necessary to make the Steele County service delivery program more effective, particularly in regard to attracting younger seniors and Boomers;

4) Asset mapping -- The asset-based approach identified resources already existing in the community in the five areas identified above which can provide solutions to the challenges and needs facing both the boomer and older adult population and the institutions that serve them. Working with the Northwestern University *Asset Based Community Development Institute (ABCD)* and its Director and staff, CCR and MMS, in consultation with Steele County Human Services developed an asset mapping tool for uncovering the community’s resources. This tool was then distributed to community volunteers in 23 training meetings held in early November and December 2006. These volunteers, recruited through neighborhood meetings organized by Steele County Human Services, other human service organizations, churches and civic organizations administered asset mapping interviews to nearly 160 residents either as individuals or representatives of businesses, associations and government agencies. During this process over 50 organizations identified as assets to the community were documented, and a score of individual assets to be called upon in community-building efforts were also identified.

In addition, working with the Steele County Department of Human Services CCR and MMS conducted selected interviews with operating services organizations, located in or having an impact on Steele County, serving or having the potential to serve older adults in Steele County. This data has been used in developing a clearer picture or asset map, as well as a resource network available to Steele County's older adults.

5) Visioning Conference – On February 14 the Steele County Department of Human Services and the Communities for a Lifetime Advisory Committee sponsored a day long Visioning Conference. This conference, facilitated by faculty from Riverland Community College, included 80 invited guests. The Conference including a briefing on the demographic data developed by the Project to date; as well as a discussion of the results of the Asset Mapping results received to date.

The majority of the day was spent involved in developing a vision for action on aging using the Action Analysis methodology. Action Analysis is a method for listing, discussing, and evaluating the various forces for and against a proposed change. When a change is planned, Action Analysis helps the community look at the big picture by analyzing all of the forces impacting the change and weighing the pros and cons. By knowing the pros and cons, the community can develop strategies to reduce the impact of the opposing forces and strengthen the supporting forces.

The five Visioning Conference “workgroups” included Partnership, Housing, Transportation, Intergenerational Community Engagement and Civic Engagement. The workgroups developed fourteen separate “how to’s” or goals to be undertaken during the coming year during project Phase two. Among the goals is to design and implement a Partnership Committee to assure the actualization of the Community for a Lifetime vision. Other “how to’s” include:

- Creating opportunities to bring generations together to dispel stereotypes and foster acceptance;
- Finding ways to assist people to stay in their homes or their communities as long, and as comfortably as possible;
- Expanding exercise and health related options in Steele County for older adults and others;
- Expanding private and volunteer transportation services (within/without county).

If it is decided upon by the Advisory Committee or the new Partnership Committee to proceed with “**Phase 2**” it could include the following components:

6) Capacity building for provider boards -- CCR and MMS will undertake a training process for the boards of organizations identified by Steele County Human Services in cooperation with the Communities for a Lifetime Partnership Committee (the number and nature to be determined) to raise their capacity to undertake the recommended changes emerging from the project's phase one;

7) Community Input Sessions -- Charettes

Following the Visioning Conference, the issues, assets, and strategies developed from a county-wide perspective should be replicated on a local basis. These day-long, open meetings, known as charettes, at various publicly-accessible locations throughout the county will allow extensive local comment and translation of broader county issues into local application, previously unidentified local issues, local recommendations for projects/tasks and identification of additional local assets for achieving local project goals.

8) Implementation of Visioning Conference/Community Input recommendations -- CCR and MMS, working with Steele County Human Services and the Communities for a Lifetime Partnership Committee will convene project committees to oversee the implementation of projects in Steele County over the course of a second year of the project. CCR and MMS anticipate that roughly four or five projects, arising from the Visioning Conference, as amended through the Charettes will be implemented.

9) Implementation of senior service provider recommendations -- CCR and MMS will provide technical assistance to those senior service providers cited by Steele County Human Services to implement those the most critical tasks noted in the Phase 1 report.

10) Creation of a business and aging network consortium -- Utilizing on-site staff CCR and MMS will work to create a network of businesses supportive of initiatives focused on Boomers and other older

adults in Steele County. This network is envisioned as one working directly with Steele County Human Services.

Key Findings

The demographic analysis included information on the following data:

Total Population, 2000 - 2016

Age 50+ Populations by Age, 2000 - 2016

Total Households, 2000 - 2016

Age 55+ Households by Age, 2000 - 2016

Age 55+ Households by Tenure, 2003 - 2016

Age 65+ Households by Type, 2003 - 2016

Household Income by Age- 2000, 2006, 2011

Median Home Value by Age, 2000 - 2016

Median Net Worth by Age, 2003 - 2016

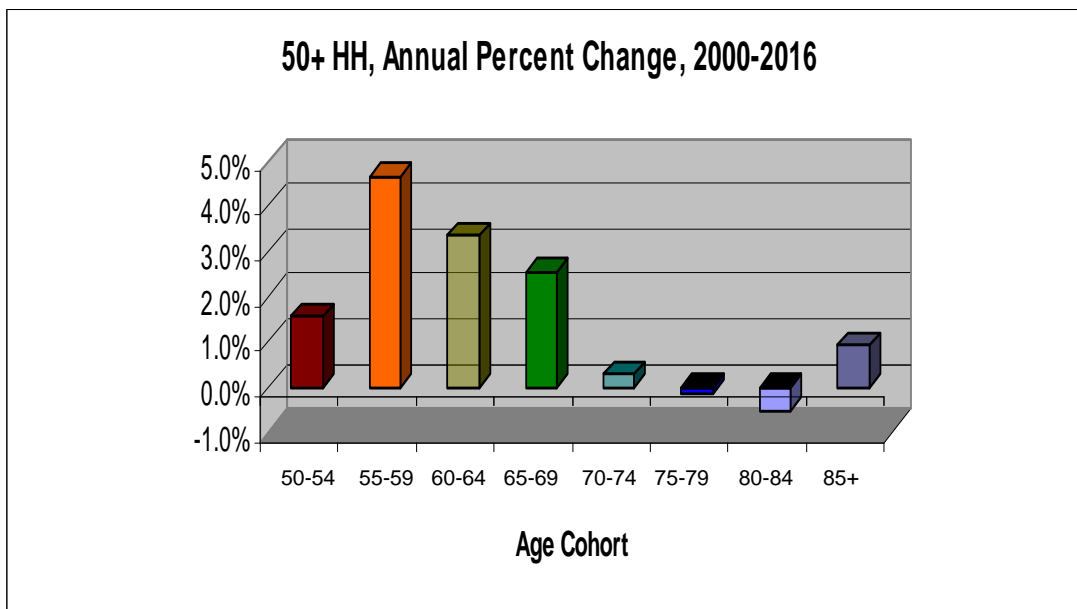
Age 50+ Populations by Age and Race-Ethnicity- 2000, 2006, 2011, 2016

Age 65+ Households Requiring ADL and Dementia Assistance by Age, 2000 - 2016.

Steele County population is expected to grow from 36,000 residents in 2006 to 39,100 by 2016, or an annual growth rate of 1.0%. The fastest growing areas within Steele County are the Medford/Northeastern County area with an annual growth rate of approximately 2%, and the northern sections of Owatonna, with an annual growth rate of 1.8%. The least growth in that same period is projected to occur in the southern part of Owatonna and the Ellendale/Central/Western parts of the county with annual growth rates of 0.3%. This growth is not necessarily the result of net in-migration, but the changing age dynamics of Steele County over the next decade.

Over 60% of the county population growth of 5,439 between 2000 to 2016 is as a result of the increase in the 50+ population. Almost 3,200 residents will enter the 50+ age cohort in that period, or an annual growth rate of 2.2%. The most rapidly increasing age cohort is the 55-59 year old cohort with annual increase of 4.6%, representing almost one-third of the total increase in the 50+ cohort.

Figure 1: Annual percent change 50+ Households, 2000-2016



Despite the popular notion of the aging of the population due to more older seniors, Steele County can actually anticipate a decrease of about 0.6% annually in its 80-84 population and no increase in its 75-79 year old population. The 50+ population as a percentage of total county population will peak in 2011 at 32.8%, or almost one in three county residents. Median age rose from 36 years in 2000 to 37 years in 2006 and remains at that age through 2016.

The number of households is also increasing steadily, with almost 1,700 households being added between 2006-2016. Countywide, average household growth is at 1.4% annually, while the northern section of the county and northern section of Owatonna remain higher than average at 2.5% and 2.3% annual increases in the number of households. Households of the 50+ cohort reflects a similar projected increase of 1,631 50+ households between 2000-2016, again with the 55-59 cohort accounting for 598, accounting for almost 37% of this increase. Households of 75-84 year olds will experience a decline of over 3% annually in this same period.

Steele County is projected to see a net decline in both homeowners and renters in the 55+ age cohort between 2006 to 2016, primarily because of decreases in the 65+ cohort homeowners/renters. Owatonna will experience the largest increase in the number of 55-64 year old homeowners and renters. There will be a slow, gradual increase of 0.3% annually in the number of one person age 65+ households in the next decade. This is typically the result of male mortality at these ages, leaving single female households in the majority as a result.

Average 55+ household income is projected to increase from \$58,700 in 2006 to \$66,889 in 2011. The household incomes in 2006 ranged from a high of \$79,113 for the 55-59 year old cohort, to a low of \$39,202 for those 85+. This level of income is a significant economic generator in the economy of Steele County. Those in less fortunate financial circumstances, with annual household incomes of less than \$15,000 make up 14.3% of all 55+ households in 2006, and are projected to drop to 11.8% by 2001. Another economic indicator for the 55+ cohort is also expected to rise from \$147,464 in 2006, to \$159,981 in 2011, and \$173,559 in 2016 an appreciation of almost 18% in that period. Median net worth is also projected to increase from \$98,091 in 2006, to \$111,112 in 2011, to \$120,543 in 2016.

In aggregate, these economic indicators for the 50 + population underscore the tremendous economic “engine” that this age group provides. Household income, which is typically the financial resource for consumer purchases, mortgage payments, contributions, taxes, etc., alone contributed almost \$389 million in 2006, and will increase to \$494.6 million in 2011 and \$563 million by 2016. (Fig. 2)

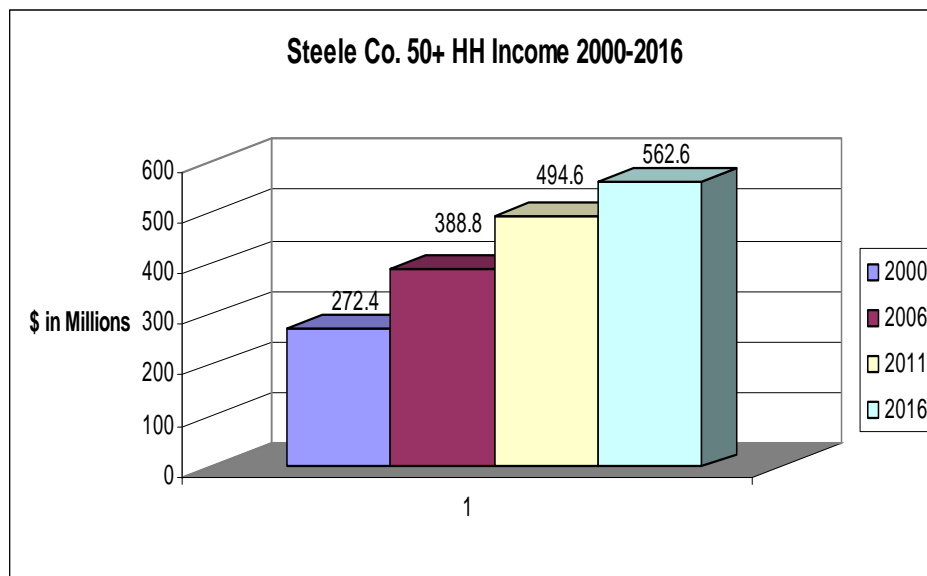


Fig. 2: Household Income 50+ HH, 2000-2016

Minority residents represent a very small fraction of Steele County's 50+ population, only 1.4% total for all minority groups. By far, the largest segment is Hispanic, followed by Black and Asian. The percentage of minority residents over the age of 50 is projected to rise to almost 1.8% of the total 50+ population by 2016. There is some concern that the most recent census data and project projections may be undercounting the Black population in the county, many of whom are Somali immigrants and refugees who have settled in the Owatonna area. Because of incomplete records and cultural norms which do not register formal age, there may be somewhat more Blacks in the 50+ group than has been formally recorded. The same may exist with the Hispanic population.

The project demographic analysis also provides information about the current and future levels of care expected to be needed by the county's 65 + population. (Table 1) This is particularly important for planning purposes for the various county departments responsible for coordinating and providing services to the senior population. The data indicates that the number of households requiring assistance with Activities of Daily Living (ADL) and dementia care will actually peak in 2006 and then are projected to decline slightly through 2016. This corresponds with the small to declining growth of Steele County's older population age 75-84, and small increases in the 85+ population noted earlier. It also has implications on the need for additional assisted living facilities and memory care facilities which have recently been developed by private developers and service providers.

While this is the case through 2016, the information also suggests that after 2016 Steele County may experience a growing need for these services and facilities as the older 75+ population grows in light of the recent 2006 projections. At some point, particularly when today's 55-64 year olds transitions to the 75+ age group Steele County will need to be prepared for the possibility of a significantly different scenario.

Table 1: Households Requiring ADL** and Dementia Care by Age, 2003-2016

AGE 65+ HOUSEHOLDS REQUIRING ADL ASSISTANCE BY AGE						
	2000	2006	2011	2016		
65+/ADLs**	254	281	274	272		
65+HH***	2,897	3,036	3,216	3,202		
Percent	8.8%	9.2%	8.5%	8.5%		
AGE 65+ HOUSEHOLDS REQUIRING DEMENTIA ASSISTANCE BY AGE						
	2000	2006	2011	2016		
65+/ADLs	110	129	119	118		
65+HH	2,897	3,036	3,216	3,202		
Percent	3.8%	4.3%	3.7%	3.7%		

** ADLs or Activities of Daily Living is a way to describe the functional status of a person. It is a tool in the biopsychosocial model of medicine, and is useful for assessing the elderly, the mentally ill, those with chronic diseases, and others. ADL activities include things such as eating, drinking, toileting, bathing, transferring, etc.

*** HH or households, is a domestic unit of related or unrelated individuals who live together in the same domicile.

While the anticipated demand for additional Assisted Living (AL) resources will be marginal, the recent development of private AL communities, conversion of additional assisted living beds in Blooming Prairie, and current plans for additional private AL facility development in Owatonna signals the potential for overdevelopment of traditional AL in the immediate future. Figure 3 displays the recent growth in Steele Co. Assisted Living beds from 2005-2007, including 100+ proposed new AL beds projected for availability in the fall, 2007.

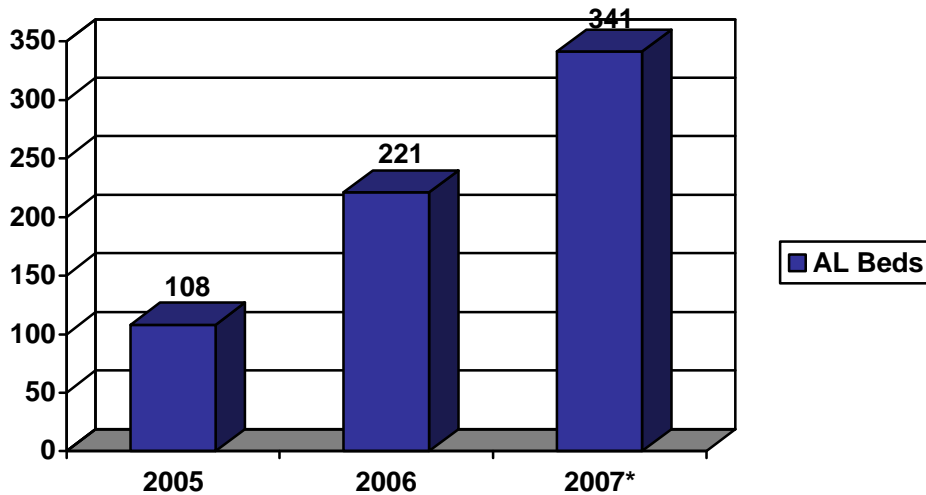


Figure 3: Assisted Living Beds, Steele Co. 2005-2007

* includes actual and proposed beds in development.

We would also note that it is typical for new Assisted Living development to concentrate on a very narrow, affluent segment of the 70+ population with limited regard for issues of either need or demand for affordable service-enriched housing opportunities. Analysis of the county's 65+ households indicates that approximately 31% of that cohort fall at or below the \$22,684 household income threshold for service waivers. In 2006, Steele County had 1,561 households age 65+, or 51.4% whose annual household income was below \$36,000. Since the typical assisted living community charges \$3,000 per month or more for rent and services, a key issue arises as to whether the average older resident in the county could even afford the cost of assisted living if they needed these services.

Gap Analysis Issues Addressed

The information gathering and dissemination to a very broad spectrum of the county's providers, businesses, governing bodies, and citizen groups also fulfilled some of the responses recommended in its county-wide gap analysis. In particular, the project demographic analysis, meetings, and consultation.

- Helped identify priorities for continuing change initiatives
- Provided local community groups, providers, city councils, interested citizens, and businesses with demographic information, projections, etc. for planning purposes
- Facilitated identification of community resident gifts and assets which can be used as a basis for assisting the community

- Identified change initiative partners and outlined a structure and framework for partnership activities
- Increased community awareness and communication regarding available services
- Made businesses and government more aware of the assets, gift, resources, and needs of boomer and senior residents
- Identified potential workforce shortage issues with local employers

Visioning Conference Action Analysis

The Visioning Conference gathered over 80 residents, service providers, municipal/county/state government representatives in a day long process of examining five issue areas and projecting both the resources, and driving and restraining forces within the county affecting those areas. The following potential projects reflect the thinking and assessment of the potential for new directions in Steele County programs.

The Visioning Conference Participants participated in a three types of sessions during the conference. First the Project Principals, Michael Marcus and John Migliaccio, reviewed the demographic data gathered during the first three months of the Project. Marcus and Migliaccio went on to summarize the Asset Mapping process including the collection of roughly 160 interviews. That data is contained in a project spreadsheet made available to Steele County Human Services and the Project Advisory Committee.

During the Visioning Conference the participants divided into five work groups: Intergenerational Community Engagement; Civic Engagement (which merged with Intergenerational Community Engagement during the Conference); Partnership; Housing; Health and Wellness; and Transportation. Each workgroup utilized the Action Analysis process for identifying Project goals in the particular workgroup area of interest, and then developed “next step” plans in each area. The Action Analysis worksheets have been made available to Steele County Human Services and the Project Advisory Committee.

At the close of the Visioning Conference the attendees reconvened to discuss, briefly, the findings and recommendations of each of the workgroups. It is these recommendations that will form the basis of the community response/charette meetings recommended for Project Phase 2.

Below is a brief summary of a few of the program goals and next steps for each of the workgroups that submitted a Conference Worksheet. It should be noted that each of the workgroups provided a summary of driving and resisting forces to change and assets needed to make those changes.

Intergenerational Community Engagement

Goals (How To's)	Next Steps
Create opportunities to bring generations together to dispel stereotypes and foster acceptance.	ID key players in community to facilitate opportunities ID areas of interest
Maximize the benefits to individuals as well as the entire community by the sharing of knowledge and skills across generations.	Determine methods of delivery Administrator
Partner senior “parents” with “new” parents to model parenting skills.	ID facilitating agency Develop a mission Recruit volunteers

	Conduct trainings Obtain funding Program development/ curriculum Raise awareness - media blitz ID need ID populations of quality volunteers
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Housing

Goals (How To's)	Next Steps
Continuum of housing.	Make the case – county, city –for needs
People stay in homes or their community.	Work with volunteer organizations to assist in providing needed services to seniors
Create county/local plan for housing.	Work with city/county on zoning needs

Health and Wellness

Goals (How To's)	Next Steps
Expand exercise and health related options to all Steele County communities.	Develop task force Resource list Contact YMCA to explore task force option in Steele County
Market/Educate residents on the importance of health/wellness (exercise) programs to increase level of participation	Public information meeting Develop a marketing plan
Improve access to the new health care campus. Get businesses to incorporate caregiver related benefits.	Contact businesses to form task force Assessment to see what is available
Have a geriatric specialist for Owatonna area residents.	Work with the Clinic to identify possible collaboration on this area

Transportation

Goals (How To's)	Next Steps
Expand private and volunteer transportation services (within/without county)	Identify existing programs Identify ways in which individuals gain access to the programs Define issues the programs have had, i.e. insurance, volunteer recruitment, etc.
Provide door-in-door personal assistance and transportation	Develop a task force to work with existing private and volunteer programs

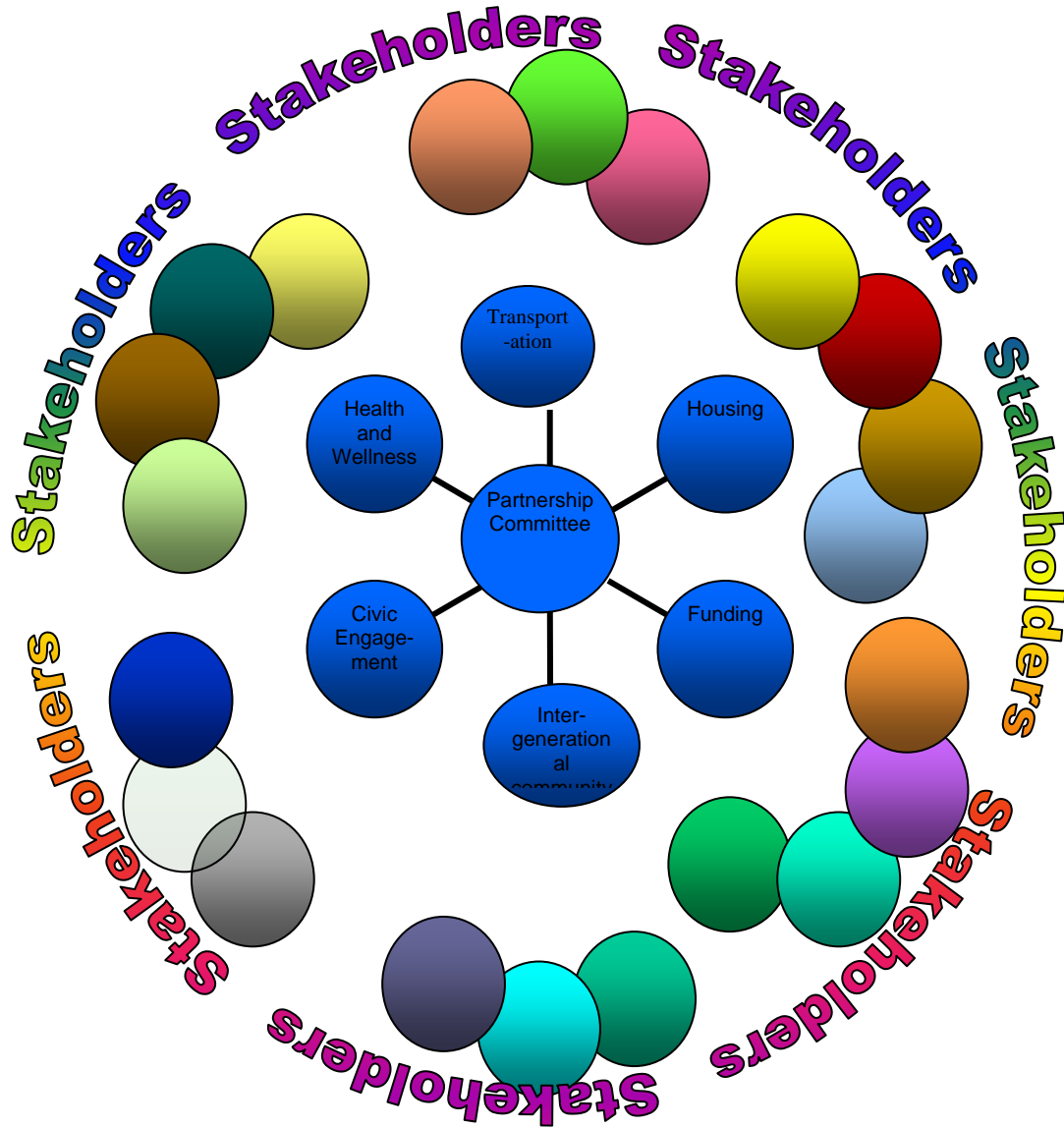
Design roads, highways, and signage to be senior friendly	Develop a task force for this purpose Work with the County to develop a system for this purpose
Communicate what services are available (public & private transportation)	Work with the County to develop an on-line guide

Partnership

Goals (How To's)	Next Steps
Design and implement a Partnership Committee governance structure to assure the actualization of the Community For a LIFETIME vision.	<p>All stakeholders/partners identified All stakeholders/partners recruited Effective communication and balanced participation Identify all modalities of need Palliative Acute Preventative holistic Spiritual Cultural Recreational Etc</p> <p>Develop Ground Rules Document Stakeholders' self interest Develop specific, time-bound goals Develop a vision statement and mission that takes into account planning and goals of all other groups Develop job descriptions Allows independence/autonomy in spite of who funds it Identify long-term and short-term resourcing of the committee Benchmark processes against other communities</p>

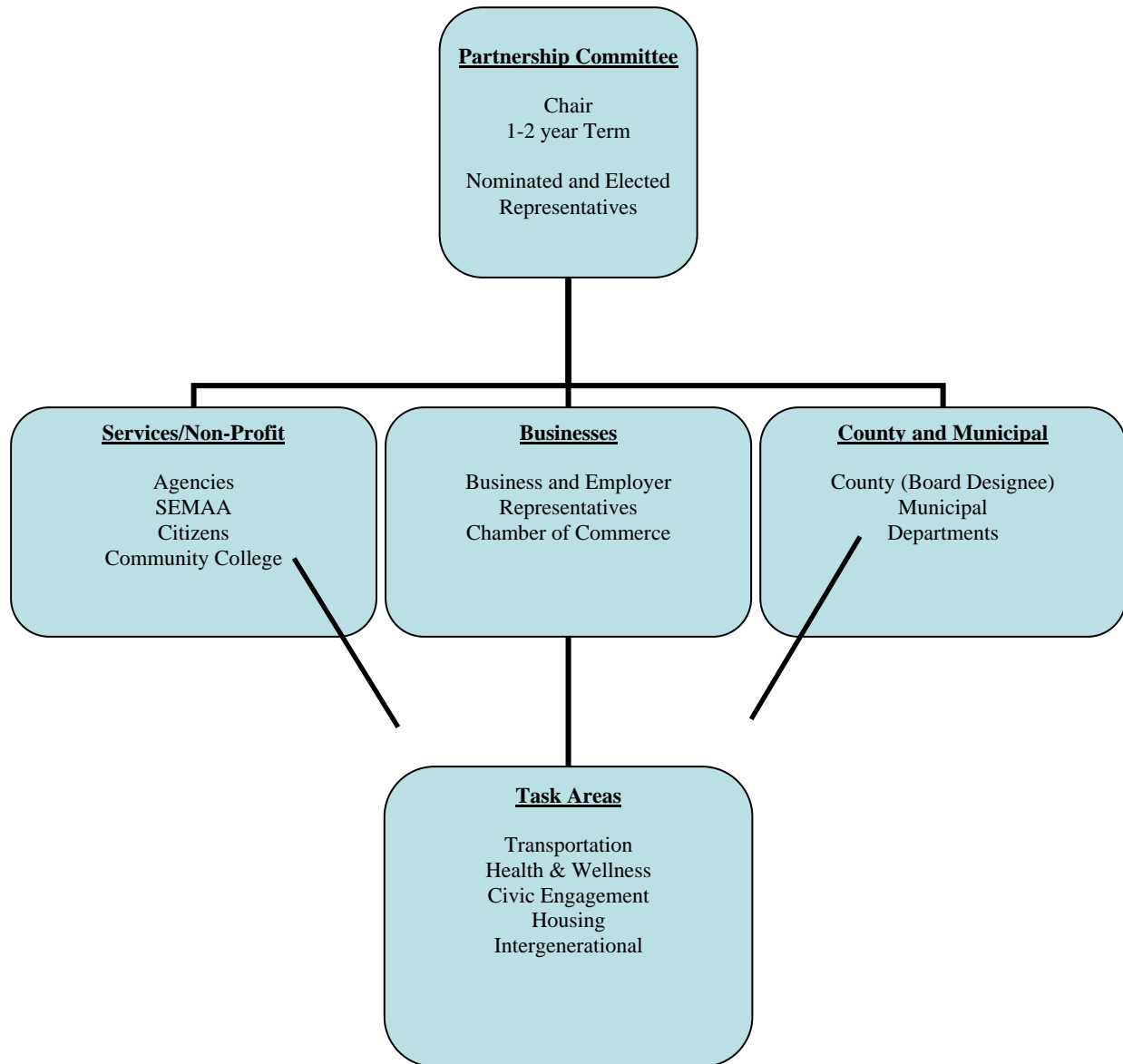
The following diagram represents a potential structure for the proposed community partnership as developed by that Visioning Conference team and Doug Parr, the team facilitator.

*Steele County Proposed Community Partnership Structure
for addressing Communities for a Lifetime issues*



The following suggested Partnership Committee governance structure can organize activities, support, asset and resources mapping/development within their particular sector, and also coordinate across sectors for each of the six issue areas identified above. It is critical that this Committee dedicate itself to bringing the Visioning Conference issues to the local level, but in a coordinated, non-competitive, non-duplicative way.

Partnership Committee Governance



Lessons Learned:

- Steele County can make continued good use of the high quality demographic data projections gathered during the project so far. The data provided in Phase 1 was deeply appreciated by every segment of the community, particularly the municipal governments, business community, and service providers. That data is important to making informed decisions about the future of communities, particularly in a time of significant demographic change, as will be experienced in Steele County in the next decades.
- An asset based approach to community development in Steele County offers a wider array of options for community change than more traditional deficit based approaches.
- Citizens and their associations can be effective partners for government in seeking to undertake major community development efforts.
- Simply assuming that demographic change dictates traditional approaches may not be in the best interest of communities. For example, responding to a growing population of older adults by assuming that the community must build and/or host additional assisted living or intermediate care facilities. The gap analysis and community dialogues indicated that communities may be better served by partnering with some of the new facilities as a staging area for delivery of adult day care, respite, and home health services.
- Grassroots efforts at asset data collection can be a more effective means of identifying community assets than using existing formal institutions. In those areas where community residents were most involved in directing and completing local asset mapping activities, the depth of community connection was significantly higher.
- Steele County as a whole and its individual communities face a host of issues associated with demographic change which may not be present in more urbanized communities. However, asset based tools can be adapted to any community to assist and create locally driven initiatives to address local issues, rather than relying on or expecting municipal or county intervention. The asset maps in particular now provide a basis for expansion of information gathering about personal, associational and institutional gifts in the local community/and neighborhood where these can be directly applied to service and quality of life gaps at a local and county-wide basis.

Communities for a Lifetime Advisory Committee

Members:

Nijole Aaseth	Ellendale community representative
Connie Bagley	Southeastern Minnesota Area Agency on Aging
Debbie Betthausen	SEMCAC
Shawn Brandvold	Steele County Human Services
Elise Davis	Southern Minnesota Initiative Foundation
Evelina Giobbe	United Way of Steele County
Heather Goodwin	Steele County Human Services
Francy Hall	CONTACT
Kelly Harder	Steele County Human Services
Cheryl Jeffries	Owatonna Healthy Seniors Program
Mary Kittelson	Blooming Prairie community representative
Mary Nathan	SEMCAC
Sue Paulson	Steele County Public Health
DeeAnn Pettyjohn	Steele County Public Health

Anne Pleskonko	Senior Place
Dean Rudloff	Medford Senior Care Connection
Amy Smith	South Country Health Alliance
Cathy Waldock	SEMCAC
Sue Haugen	Medford Senior Care Connection

Project Consultants

The project consultant principals have over 50 years of combined experience working in the fields of aging, community capacity building, asset based community development, research, planning, and resource development for both public and private sector organizations, business development and human services.

Consultants for Community Resources works with government, non-profits, and foundations to develop economic, community and social capital utilizing asset mapping and visioning techniques among other methods. CCR has worked with nearly two dozen organizations and communities training, mapping and developing asset based initiatives since its founding in 2004. Michael Marcus, the Principal of CCR is well known and recognized for work as a Senior Program Officer for Basic Human Needs, at the Chicago Community Trust. He managed a grant making budget of up to \$8,000,000 a year including but not limited to the areas of aging, shelter, food security, welfare, public housing, youth enrichment, immigrant communities, child welfare and mental health; Prior to coming to the Trust Marcus served as Associate Director for Community Resources for the Families USA Foundation of Boston, now known as Community Catalyst.

Marcus was the innovator behind several major initiatives in Metropolitan Chicago. For example the Illinois Affordable Assisted Living Initiative is a 3-agency/3 foundation collaborative seeking to increase the number of affordable assisted living units for low and moderate-income seniors in Illinois. The project involves a project team of technical assistance providers and policy advocates; a grant fund of over \$600,000 for those agencies considering the possibility; a loan fund of over \$2.5 million; and low-income housing tax credits.

Marcus is also the developer of Partnership for New Communities, a ten year \$25 Million fund intended to inspire economic development in neighborhoods “hosting” Chicago Housing Authority public housing developments. PNC is now a joint project between the Chicago Community Trust, the MacArthur Foundation and several other local businesses and foundations.

Early in his career Marcus directed a major community capacity building project in California and Maryland, which sought to use community resources to meet community needs. The projects, based in Hyattsville Maryland and Pittsburg California, resulted in the construction of low-income housing, a new commuter center, and new youth and senior recreational facilities in Hyattsville. In Pittsburg the project resulted in new affordable housing, new youth recreation facilities, and a marina resulting in the creation of dozens of jobs.

On a related topic Marcus currently serves as a faculty member of the Leadership Practice (LP), a nonprofit partnership between Public Allies, a community service program for college age and young adults, and the Asset Based Community Development (ABCD) Institute of Northwestern University, where Marcus also serves as a faculty member. In his role as an LP faculty member he acts as a trainer with community based organizations across the country using an asset based approach to community development issues.

Maturity Mark Services Co. specializes in innovative programs in housing, insurance and financial services marketing, eldercare, research, and pre-retirement/retiree programs for clients such as American Express Co., IBM Corp., Smith Barney, Meredith Publishing/Sears Roebuck, New York Life, U.S. Administration on Aging, Montgomery Ward, AdultCare, MetLife, Lifeline Systems, Guarantee Trust Life, State Farm Insurance Cos., Pulte Homes, and many others.

Maturity Mark Services Co. completed one of the nation's most comprehensive research projects on the Baby Boomers for the U.S. Administration on Aging. This two year project involved research, focus groups, and telephone surveys on the major healthcare, financial security, and quality of life issues facing baby boomers, resulting in the first AoA National Conference and ongoing initiative on ***Redefining Retirement***.

Dr. John Migliaccio, president of Maturity Mark Services, directed one of the nation's first corporate eldercare research and education projects in 1987, involving surveys of pre-retired and retiree caregivers, and corporate human resources executives, and co-directed a national survey of baby boomer caregivers for the National Alliance for Caregiving and the Axa Foundation. He has consulted for and presented information on eldercare and long-term care issues for numerous associations, corporations, and major insurance companies. He has also served on expert panels and provided research consulting on these issues for the National Council on Aging, the American Society on Aging, home health companies, and long-term care insurance providers. Current projects include instrument design and data analysis for a national survey of hospital-based senior membership programs, and a national survey of baby boomers. His expertise includes research design, data analysis and interpretation, construct validation, consumer research on seniors and baby boomers, and marketing.

Together, the Project Principals have worked on several important projects including the ***Montgomery County, PA Boomer*ANG Project***, a strategic planning project of innovative research and community capacity building funded by the Montgomery Co. Office of Aging and Adult Services, the North Penn Community Health Foundation and other community funders. It has become a model for combining sophisticated demographic analysis, broad community outreach, and an asset-based model of community development addressing the status, needs and opportunities that exist for Baby-Boomers and current residents age 60 and older. This project has been awarded the National Institute of Senior Centers (NISC) Research Award for 2007.

Marcus and Migliaccio also recently completed the ***US EPA's Aging Initiative Smart Growth and Aging National Recognition Program***, which included the development of an on-line community assessment regarding the level of involvement of municipalities in using Smart Growth planning to encourage Active Aging. The National Recognition Program is intended to encourage communities to manage its built environment to encourage active aging.

The Project Principals are now working on two other asset based projects, in Montgomery County Pennsylvania, site of the original Boomer*ANG Project and in Westchester County, New York. In both projects they are bringing the combination of sophisticated demographic analysis, broad community outreach and an asset-based approach to community development.

Both Project Principals have a long history of managing national, regional, and local projects. During these projects, both principals have had effective working relationships with the leadership of the Asset Based Community Development Institute, Civic Ventures Foundation, the American Society on Aging, Public Allies, the National Council on Aging, the American Association of Homes and Services for the Elderly, Generations United, the Chicago Council for Jewish Elderly, and a host of other organizations.

List of meetings and interviews

- *Riverland Community College
- *Owatonna City Administrator
- *Owatonna City Council
- *Steele County Board
- *Senior living facilities (assisted living, nursing homes)
- *Owatonna Community members
- *Ellendale town hall meeting
- *Blooming Prairie town hall meeting
- *Steele County faith community
- *Hospital CEO
- *Owatonna Clinic executives
- *Somali community representatives
- *Latino community representatives
- *Business representatives in Owatonna
- *Owatonna Chamber of Commerce Board of Directors
- *Southeastern Minnesota Area Agency on Aging
- *Senior Place
- *SEMCAC
- *Owatonna Healthy Seniors
- *United Way - executive committee
- *Human Relations Center
- *Senator Day & Representative Ruth
- *Ellendale EDA
- *Owatonna Realtors Association
- *Southern Minnesota Initiative Foundation
- *Medford Senior Care Connection
- *Hospital Auxiliary