

Living
Longer *AND*
STRONGER *in*
Dakota County

A partnership of  and 

Aging Initiative Review and
Final Report
2008-2010

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PURPOSE OF THE DOCUMENT

In 2007, Dakota County and DARTS partnered to begin addressing issues related to the growing population of aging baby boomer residents. The purpose of this document is to provide a comprehensive report outlining the *Living Longer and Stronger in Dakota County* (LLS) initiative executed by DARTS from 2008 through 2010. This document serves to outline the Dakota County drivers for the aging initiative; the vision and strategies developed to plan, prioritize and implement programs; the planned and actual outcomes of the initiative; and recommendations and opportunities for *Living Longer and Stronger in Dakota County*.

This document is a summary of accomplishments and information captured throughout the lifespan of the three-year LLS initiative. More detailed information, project documents and implementation tools are available at www.livinglongerandstronger.org. This document will serve as the roadmap taken for the LLS initiative and seeks to outline the organizational structure, community engagement process and overall methodology used to prioritize and define deliverables for the initiative. This report and its referenced material is not only a formal recap of work completed to date but is meant to be a cornerstone of information used in the future of the LLS initiative.

INITIATIVE OVERVIEW

Preparing for the population age wave is an enormous task. In Dakota County, dramatic changes are forecast between 2010 and 2020 for the 65+ population:

- it will increase by 71 percent compared to 10 percent for total population
- it will grow from nine percent to 14 percent of total population

This population growth will dramatically affect service needs in multiple areas, including housing, transportation, employment, community involvement, physical wellness, and financial planning.

Recognizing the importance of preparing for these challenges, in 2006 the Dakota County Board of Commissioners directed County staff to conduct an “aging initiative” study. This project, launched in May 2006, looked at the projected population growth of older residents and how their needs might impact services provided by County government, state government, and community-based organizations. In April 2007, Dakota County released the report [Dakota County Aging Initiative: Navigating the Age Wave](#).

As a result of recommendations contained in the report, in 2008 Dakota County contracted with DARTS, a non-profit agency, to launch the *Living Longer and Stronger in Dakota County* (LLS) initiative. The purpose of LLS was to use a community-based approach that would coalesce assets of various stakeholder groups to bring to reality the aims of the County report.

Vision, Mission, Purpose

The original vision statement for Dakota County's 2007 Aging Initiative, developed by organizational representatives and reviewed by community residents, was:

Dakota County is a network of accessible communities that provides opportunities for seniors to have active and vital lifestyles.

As DARTS began the process of defining the LLS initiative, additional work with the County was completed to better describe the initiative:

Living Longer and Stronger in Dakota County is an initiative to plan and prepare for the changing needs of an aging population, driven by people who live and work here.

The vision statements above served as touch points while the LLS work evolved in an "on-the-ground" way. That practical evolution brought further clarity and specificity to current and future LLS work as articulated by participants in the final year of the initiative:

The **Vision statement** became:

Living Longer and Stronger in Dakota County builds a network of vital, accessible communities, specifically addressing the needs and leveraging the assets of an aging population.

The **Mission statement** of LLS continues to deepen the vision of LLS and is stated as:

Living Longer and Stronger in Dakota County influences and facilitates local action and change that fosters communities that are vibrant across the lifespan.

The **Purposes** of LLS are stated as:

- Discern and articulate the evolving community agenda: investigate local needs; identify and prioritize action steps
- Inspire and engage individuals: foster leadership among the community of experts and committed residents and officials
- Connect organizations from all sectors: convene stakeholders and potential partners to work on community-driven strategies; support them with facilitation; create strategic alliances
- Collect and disseminate relevant information and expertise: increase awareness; support research and development of best practices
- Leverage the civic engagement of older adults
- Secure funding to advance community strategies

Values

As the work proceeded throughout the lifespan of the initiative, core principles became evident. These fundamental values helped to shape the direction and focus for the initiative. They also serve to provide future focus to the evolution of work yet to be developed.
Living Longer and Stronger in Dakota County values ...

...**Collaboration**. Working across sectors and providing a forum for stakeholder discussion will improve our effectiveness and efficiency. We are a broad-based organization that values partnerships.

...**A community engagement approach**. Our power lies in our ability to work closely with residents and their ability to create social capital that can lead to action. Organizing and strengthening new connections to, and between, residents is one of the most valued outcomes of our work. As the initiative evolves, it must continue to motivate and inspire passionate volunteers and build on the important work they have already completed.

...**The community's aging**. Older adults bring expertise, time, and passion to the task of improving the community. Similarly, the institutions, collective experience, and established alliances of a mature community are powerful assets.

...**Planning**. A good old age is best achieved by preparation that occurs much earlier in life. Planning that happens on both an individual and societal level will lead to communities that are vibrant for a lifetime.

Strategies

Issues related to the aging of the population are numerous and broad, and both Dakota County and DARTS sought to bring focus to these areas to help prioritize the initiative objectives. Each organization brought specific strengths and strategies for developing LLS.

Dakota County Strategies

In early 2006 Dakota County Commissioners voted to fund an Aging Initiative. The Office of Planning and Analysis completed a report describing the projected growth of older adults in the County and identified six issue areas with accompanying strategies to ensure aging residents could remain independent and successful in the community.

The six themes with corresponding goals outlined in the County's Aging Initiative Report were:

Finance: To improve the ability of residents to effectively plan for their financial future

Health and Wellness: To improve overall health (physical and emotional) to protect residents' independence

Housing: To provide adequate housing for the life-cycle needs of residents

Services: To provide accessible and quality services that support seniors and caregivers in home and community settings

Transportation: To provide needed transportation options to help keep residents mobile and independent

Work and Community Engagement: To provide meaningful opportunities for seniors to contribute to their communities

Dakota County set out a timeline of incremental phases for the Aging Initiative:

Phase 1 2006-2007	Research, Strategic Planning and Strategy Development
Phase 2 2008	Stakeholder Engagement, Implementation Planning and Implementation of Quick Wins
Phase 3 2009-2010	Continued Implementation Planning and Longer-Term Strategies

In 2008, Dakota County contracted with DARTS to implement the strategies recommended in the report. The County aligned key County planner resources to the LLS effort to provide expertise and County perspective. Senior County representatives also sat on the Advisory Committee and the Sustainability Committee to provide input and County leadership throughout the lifespan of the LLS initiative.

The **strengths** that Dakota County brought to the LLS initiative included:

- Aging Initiative Report and all of its accompanying data and analysis
- Issue area structure and strategy recommendations which were leveraged throughout the LLS initiative program development
- Office of Planning and Analysis involvement which lent a cross-departmental and analytical perspective
- Subject Matter Experts for several issue areas/themes (transportation, housing, etc.)
- Visibility, stature and reach of Dakota County government

DARTS Strategies

DARTS, a volunteer-driven nonprofit organization, is a community leader in successful aging and life transitions and a partner with others in innovative, aging-friendly goals. DARTS was a key stakeholder and early advisor to the Dakota County Aging Initiative.

The **strengths** that DARTS brought to the LLS initiative included:

- Credibility, experience and expertise in aging, caregiving, transportation, volunteerism and communications
- Subject Matter Experts for several of the themes (transportation, services, etc.)
- Experience with and reputation for community-based and partnership-driven approaches to programs
- Reciprocal connection with community members and their networks

DARTS began the LLS implementation strategy by hiring a full-time Community Initiative Director to begin the process of establishing the methodology, organization and structure for moving the initiative forward. DARTS' senior management and board of directors stayed engaged on the Advisory and Sustainability Committees.

Living Longer and Stronger in Dakota County Strategies

Starting with the initial framework outlined in the Aging Initiative Report, LLS focused on building structure and process to support the six theme team strategies identified by the County. LLS strategies began with establishing the community engagement model (outlined below) as well as the structure and process to define and implement specific activities.

The **strengths** that the LLS approach brought to the initiative included:

- A framework upon which people, partners and networks could operationalize a community engagement approach
- A neutral platform for developing and exchanging ideas among persons from various disciplines and perspectives and channeling their passion into action

The six themes identified in the Dakota County Aging Initiative were sustained and used as the springboard for specific projects. In order to define, prioritize and fulfill objectives outlined for the LLS initiative, a complete organizational framework needed to be built. The overarching approach used to build LLS was to fully embrace a community engagement model to attract and sustain volunteers that would propel the LLS initiative forward.

Approach: Community Engagement Model

The LLS public engagement process exists to address the needs of the aging demographic in an inclusive, grassroots manner. It meets a community-wide need for capacity building and is a process for cost-effective initiative implementation.

The community engagement approach:

1. Offers a repeatable process for capacity building
2. Creates a sustainable cadre of highly skilled and engaged volunteers
3. Is the agent for active community participation on many levels; resident input, subject matter expertise, process management, oversight
4. Is a cost-effective organizational model; leveraging funds to expand resources
5. Engenders community ownership of the issues at hand, shared responsibility for arriving at needed solutions, and a collective sense of accomplishment that further fuels the effort

The steps taken to deploy the LLS community engagement model were as follows:

1. A **Launch Team** was recruited and established to design the process needed for engaging volunteers and participants in the LLS initiative.
2. **Existing professional networks** of County, DARTS and LLS leadership were leveraged to engage community participants. Letters, phone calls and individual meetings were held to start the process of recruiting interested volunteers for LLS.
3. A **Community Kick-Off Forum** was held to further educate potential recruits to the initiative and the civic engagement opportunity. The event was publicized at local libraries, on websites and through letters and personal referrals.

4. **Volunteer recruits were enlisted** into the six theme teams based on personal interest and expertise immediately after the Community Volunteer Forum. These became multi-disciplinary teams comprised of experts, residents, County representatives, process facilitators, business leaders, and academics.
5. An **Advisory Committee** was established to provide overall guidance. Specific responsibilities included: ongoing environmental scan of aging issues; sounding board for project development; refinement of project direction and desired outcomes; sharing relevant policy and budgetary expertise and industry and constituent knowledge; identifying potential partnerships, funding and other resources.
6. **Ongoing education and engagement** of the volunteer workforce was sustained through providing guest speakers, facilitating networking opportunities, and encouraging knowledge sharing within and among the teams.

INITIATIVE OBJECTIVES AND GOALS

The 2007 Dakota County Aging Initiative Report was used as the foundation to establish the *Living Longer and Stronger in Dakota County* objectives and possible activities. Because of the large volume of information and potential strategies contained in the report, the original Aging Initiative core group was re-convened to provide direction that would help the six theme teams refine objectives into feasible activities that could be acted upon. Initiative objectives were established by Dakota County in the initial report and by the teams themselves through the Team Charters. Objectives and goals by each theme team:

Finance

Dakota County established objectives:

1. Decrease the number of residents who are at risk of income insufficiency in retirement.
2. Increase the number of residents prepared for the cost of long-term care in retirement.

LLS established goal:

Ensure that residents have the tools to create a lifetime of financial stability, through the coordination and implementation of a model of education programs for all generations, with the end goal of a self-supported senior.

Health and Wellness

Dakota County established objectives:

1. Increase the number of physically active residents.
2. Reduce the level of obesity.
3. Improve access to long-term care alternative services.

LLS established goal:

Maximize the health and well being of older adults by keeping them active, vital and engaged in the community, including finding ways to redesign senior centers to attract and respond to the increasing 55+ population and its changing needs.

Housing

Dakota County established objectives:

1. Improve understanding of future housing needs.
2. Identify options for maintaining independent living.
3. Define the needs for housing to meet the requirement of older residents.

LLS established goal:

Provide adequate housing for the life cycle needs of residents by developing and promoting approaches to provide safety, accessibility and long-term livability for people living in single family detached homes, duplexes and town homes.

Services

Dakota County established objectives:

1. Increase access to needed services related information.
2. Increase support for caregivers.
3. Increase proportion of residents served in home and community settings.

LLS established goal:

Establish a new informal support system of family and neighborhood caregivers that, combined with traditional formal support services, would provide increased flexibility and cost savings to help older adults remain in the home of their choice.

Transportation

Dakota County established objectives:

1. Improve coordination of transportation options.
2. Increase number of volunteer drivers.
3. Improve physical infrastructure to promote independence.

LLS established goal:

Improve transit services and mobility options for older adults in Dakota County.

Work and Community

Dakota County established objectives:

1. Increase the number of senior volunteers.
2. Increase the number of community engagement opportunities (social, arts and recreational).

LLS established goal:

Tap into the knowledge, experience and leadership of older adults to serve personal, business and community needs.

COMMUNITY IMPACTS

The three-year *Living Longer and Stronger in Dakota County* initiative had detailed deliverables and outcomes associated with each of the theme teams. In addition to these specific products, the initiative brought forth overall impacts to the community and methodologies that can be applied to similar initiatives. The following impacts were produced throughout the lifespan of the initiative:

Community Engagement Model

A community engagement model was used to recruit and sustain an active, highly skilled workforce that moved the LLS initiative and its projects into implementable products. This repeatable process ensured that Dakota County residents were recruited as volunteer resources and as critical providers of input for all of the initiative theme teams. Volunteers became ambassadors and citizen advocates for the LLS initiative and the projects on which they were working. Building community awareness of LLS and recruitment of additional volunteers was sustained through the grass roots nature of this model.

Over 4,000 hours of highly skilled volunteer time was dedicated to LLS through a community engagement model. A recent NCOA (National Council on Aging) study shows an 8 to 1 return on investment when adults 55+ are used in volunteer leadership-level positions in organizations.

Public and Peer Awareness

A communications plan was developed to engage the public about LLS and the projects underway. LLS outreach to the general public was completed through these key activities:

- Community events and forums
- Local cable television shows
- Literature describing and promoting LLS
- LLS articles in local community publications as well as major Twin Cities newspapers
- LLS presentations (PowerPoint, panelist, speaker) at venues ranging from civic groups to businesses to faith-based organizations
- LLS presence on DARTS and Dakota County websites
- LLS News Notes published regularly and distributed electronically
- Word of mouth recruitment and education

The community outreach done by some theme teams to gather data and help set priorities also advanced the education process of the general community about the LLS initiative. In addition, LLS volunteers educated their networks about the initiative.

LLS outreach to peers and professionals in aging and community services included:

- Speaking engagements and participation in conferences and forums held by other County and state entities
- Sharing of process best practices, particularly related to community engagement and volunteer recruitment

Alliances: Public, Private, Non-profit, Resident

One critical success factor from the LLS initiative was the strength of the cross-functional teams and alliances created throughout the three-year initiative. Community volunteers were often subject matter experts in their themes and contributed a vast knowledge base to their teams. County planners/analysts were assigned in the second year to assist with gathering relevant data and information and writing reports to document the work of each team. Students and academics from the University of Minnesota's Humphrey Institute of Public Affairs were engaged to advance the work of the Housing team. Community residents were tapped to provide detailed data to assist the teams through surveys and direct interviews. Resident volunteers and staff experts built relationships seldom seen in traditional large-scale project work. Nonprofits provided community services experience and an understanding of the aging demographic. Cities, educational institutions, libraries, and faith communities provided meeting space and event venues. Businesses offered in-kind contributions. This cross section of skill sets, brain trust, and resources is critical for establishing and sustaining a volunteer workforce for any initiative.

OUTCOMES

Throughout the LLS initiative, outcomes and planned products of each of the theme teams were prioritized based on several driving factors. The subject area of each LLS theme team was broad. Initial brainstorming sessions yielded hundreds of specific products that could be potential outcomes for the initiative. The teams quickly needed to apply several driving factors to help define and prioritize outcomes. The process used to define outcomes for each theme team included:

- **Brainstorming sessions** to define all opportunities
- **Team charter** development for defining goals, objectives, scope and milestones
- **Advisory Committee** review of and input to the team charters

The driving factors for prioritizing the outcomes for each team consisted of:

- **Feasibility** of implementing the outcome in the timeframe available
- **Realistic assessment of resource availability** for the tasks at hand
- **Tangible** outcomes with impacts to the community as a priority

The following sections outline the actual outcomes of each Team and Committee throughout the duration of the LLS initiative.

Launch Team

The Launch Team began the process of establishing the methodology for building a workforce to plan, define and implement the LLS initiative. The Launch Team focused on developing a community engagement model to build the resource capacity to drive the outcomes for the initiative.

The key outcomes from the Launch Team are:

1. **Community engagement strategy:** developed a repeatable process for engaging and recruiting community volunteers and specialists to build human capacity for the LLS initiative. Launch Team members personally invited their professional and personal networks to the community kick-off forum and potential networking opportunities.
2. **Organizational structure and processes:** worked to establish the Advisory Committee and recruit theme team leaders. Templates for team charters, presentations and project plans were developed to provide guidance to the teams while allowing flexibility for each team's work. This established a process methodology to ensure each team's objectives, timeline and deliverables were defined and documented as part of the initiative.
3. **Planning and coordination:** for meetings, events, guest speakers and the initial LLS kick-off forum for community involvement.

Finance

The goal of the Finance Team was to ensure that residents are given tools and guidance to create a lifetime of financial stability and independence. Towards that goal, the Finance Team defined their scope into the following major work products:

1. **Service Provider Inventory:** identify public and private providers in the financial sector to provide education on Income/Budget Planning, Savings Programs, Estate Planning.
2. **Volunteer Recruitment:** establish a cadre of financially aware volunteers to assist older adults to avail themselves of existing programs. Partner with local employers, retired professionals and educators.
3. **Survey Secondary Education Financial Courses:** contact Dakota County Independent School Districts to determine the existence of personal finance courses that are either stand alone or embedded in other courses.

Actual outcomes for the Finance Team include:

1. **Inventory of Financial Tools and Curricula:** Significant research effort was completed to identify financial literacy needs of adults age 45 – 65, an inventory of available financial resources/services was conducted and a gap analysis was completed.
2. **Program Selection:** The Finance Team selected the curriculum "[Mapping Your Retirement](#)" (MYR) because it was a holistic approach to planning for life after full-time employment. The program took a three-pronged approach that included: Living Your Life, Maintaining Your Health and Managing Your Money.
3. **Curriculum Purchase:** LLS purchased the licensure for the curriculum which included training for the facilitator, presentation tools and workbooks for the attendees.

4. **Curriculum Adaptation:** Secured a focus group to advise the authors on the potential utility of a specialized MYR curriculum for women. Field tested some of the training elements.
5. **MYR Promotion and Deployment:** Promoted and deployed MYR in several different venues (community center, church, Dakota-Scott Financial Empowerment Collaborative, etc.) to determine what would attract attendance and garner the best results.

Many financial tools address only the financial side of life planning. For the LLS Finance Team, the premise was that financial well-being encompasses the whole person: Experiences in dealing with money, emotions tied to those experiences, and healthy attitudes about money.

The team selected MYR because it helps people explore opportunities, challenges, and options as they work toward a healthy, productive, and financially sound retirement.

Health and Wellness

The Health and Wellness Team focused on helping senior centers anticipate and adapt their model to meet changing needs and demographic profiles. The goal of the team was to maximize and enhance quality health and well being through older adult engagement in positive aging activities. Towards that goal, the Health and Wellness Team defined their scope into the following major work products:

1. **Team Formation:** develop a project team with representation from the stakeholders.
2. **Research:** conduct a literature/research review for best and preferred practices.
3. **Onsite Visits:** visit local senior centers that have successfully revamped their programs.
4. **Approach Presentation:** present the concept of redesign to the Senior/Community Center Directors in Dakota County.
5. **Selection:** identify one to three Senior/Community Centers interested in developing and implementing a project in their area.
6. **Focus Groups:** hold listening sessions with residents 55+ from senior center demonstration sites to solicit their ideas and requirements.
7. **Resources:** research available resources to assist local centers with implementation.

Actual outcomes for the Health and Wellness Team include:

1. **Replication Manual:** the Health and Wellness Team completed a detailed compilation of materials, research items, methodology and tools used in completing the deliverables for this team. The replication manual is available on the [LLS documentation website](#). Components of the manual are outlined below.
2. **Research:** national models of senior center redesign were considered and a literature review of best practices was conducted. Evaluation and survey tools were researched to be used to collect communities' needs and responses to the center redesign process.

3. **Onsite Visits:** the team conducted onsite visits to centers that have successfully redesigned their programs in order to capture best practices. The team developed a Site Visit Data Collection Tool and used this to collect data on multiple aspects of the program at each location.
4. **Readiness Assessment Matrix:** a detailed assessment matrix was created and used to evaluate the readiness of a pilot site for transformation.
5. **Pilot Site Program:** Burnsville was identified as the pilot site for implementation of a redesign project. Deliverables were completed:
 - a. Stakeholders were identified and a budget was developed.
 - b. Methodology for collecting, marketing/promoting and analyzing community dialogues was developed and implemented.
 - c. Community survey was designed and conducted both online and in person to assess resident priorities for redesign elements. Survey topics covered activities, housing, services, travel, volunteer opportunities and logistics.
 - d. Community dialogues were conducted after the survey and summary results and recommendations were compiled into a detailed report.

More than 400 Burnsville residents participated in the Health and Wellness Team's survey and community dialogues. Activities that elicited a high response of "very likely" to "likely to participate in" were community events, outdoor recreational activities and health and wellness activities.

Housing

The Housing Team focus for the LLS initiative was to ensure that older adults have housing choices that meet their needs of affordability, safety, accessibility and easy access to community resources, supportive services and personal connections. The goals of the Housing Team were to 1) build community awareness around housing issues for older adults and strategies for addressing those issues and 2) research and advocate for ways of improving housing affordability, accessibility and integration with our communities. Towards those goals, the Housing Team defined their scope into the following major work products:

1. **Inventory:** create a detailed inventory of consultants, service providers and contractors who are experts in "livability design" and "visit-ability design" to facilitate access to accessibility remodeling and universal design expertise.
2. **Research:** research financing options, including grant programs available to assist with the remodeling of seniors' homes to promote accessibility.
3. **Best Practices:** provide Dakota County cities with a population over 10,000 with a list of best practices on modifications of homes to allow people to age in their own homes.
4. **Application of Volunteer Recruitment Model:** use a community engagement model to establish a cadre of craft and trades people and other volunteers available to retrofit homes to allow residents to safely age in place. Partner with local technical schools,

area faith communities, area non-profit and business organizations and others to provide leadership and volunteers for projects.

5. **Community Access Map Creation:** create maps that overlay data such as existing older homes, existing sidewalks/trails and non-driver households to assess significant gaps in access to community resources.

Actual outcomes for the Housing Team include:

1. **Inventory and Maps:** an inventory and set of maps was created by the Dakota County planning staff and volunteers to identify the location and current capacity of Dakota County's multi-family housing developments for older adults, including independent living, assisted living and memory care facilities.
2. **Community Resource Guide:** A review of available resources for residents and professionals was conducted and resulting literature compiled in a physical resource guide. Links to guiding documents on universal design, housing funding sources, licensed local contractors and specialists, and designing communities for a lifetime are available on the [LLS documentation website](#).
3. **City Best Practices:** The following best practices were documented:
 - a. A guide to zoning practices that promote accessibility and encourage older residents to remain in their communities was developed with the help of three Dakota County cities.
 - b. A list of proactive, responsive and reactive strategies for meeting the needs of older residents was distributed to Dakota County cities with help sheets on Accessory Dwelling Units (ADUs), ideal housing types for different neighborhood styles, and housing-related financial products cities could consider offering to residents.
4. **Outreach Communication:** Housing Team members completed presentations on their findings to mayors/city managers, city and County planners, 50+ Housing Council of Builder's Association of the Twin Cities and the 2010 Age Odyssey statewide conference.
5. **Community Assessment Pilot:** The Housing Team coordinated with the Housing Studies Department at the University of Minnesota to pilot a resident assessment tool for communities interested in designing neighborhoods for a lifetime. The Team facilitated the participation of Eagan in this pilot project.
6. **Initiative Website:** The Housing Team took the lead in creating a website for the LLS initiative and populating it with information useful to residents of Dakota County. Training in website maintenance is being planned to help transition this tool from the Office of Planning and Analysis to new organizational leadership of LLS.

The LLS.org documentation website includes housing-related resources for Dakota County residents, such as a home modification guide, service provider links, advocacy group links and research data.
<http://www.livinglongerandstronger.org>

Services

The Services Team focus was to support residents as they determine their service needs and then access and provide informal neighborhood-based services that help residents age in the home or community of their choice. The team sought to build a consumer-driven model of service delivery that supports natural service systems already in place (such as family, friends, and neighbors) and integrates these with assistance delivered by formal and quasi-formal (faith communities, businesses, clubs and other organizations) entities on a local community level.

Towards that goal, the Services Team defined their scope as:

1. **Pilot:** develop a pilot project for implementing a consumer-directed, community-based services model and select a city in Dakota County to build it.
2. **Focus Groups:** use small groups of stakeholders to gather input and information to build the model, and secure community support.
3. **Summit Meeting:** host a summit meeting of organizations that provide formal and informal services for older adults and caregivers in the community to better understand options for affordable and accessible services.
4. **Deployment:** work with the pilot city to improve services, build connections and implement the model. Introduce the model into other Dakota County cities.
5. **Funding:** develop a funding strategy and pursue additional funding support for the implementation of the model.

Actual outcomes for the Services Team include:

1. **Opportunity parameters:** initial discussions by the Services Team included defining consumer-driven services, exploring ways to engage health care professionals/providers in the services model and discovering opportunities to merge the formal, quasi-formal and informal systems to deliver more and better services.
2. **Methodology:** the Services Team used the PATH process (Planning and Alternative Tomorrows with Hope) to reach a consensus on how to structure the Services approach, define the initial project and develop a timeline and milestones for the team.
3. **West St. Paul Pilot:** The Services Team selected West St. Paul (WSP) as the city to develop and pilot the model due to the size of its 65+ population and the large number of formal and informal service providers located there. Small groups of stakeholders were convened to determine interest and benefits of participation in a pilot project. The result of these focused discussions was to convene a half-day summit.
4. **Summit:** In 2009, an LLS Services Summit convened 37 West St. Paul businesses, community organizations, residents, and city and County representatives. The Services Summit was the foundation for establishing connections across service providers and began the visioning process for an ongoing services model. The summit focused on ways to broaden community connections and build networks that would result in affordable, accessible, sustainable service choices for older adults and their caregivers. It yielded a six-month commitment from 10 participants to develop a community-based services model.
5. **Funding:** The Services Team pursued additional funding to support the implementation and expansion of the community-based services model. An application was made to the MN Department of Human Services for a Community Service/Services Development

Grant. The proposal development process helped formalize the structure of the WSP Community Partnership and focused attention on falls prevention, relieving social isolation, home modifications and planning for retirement. Funding was not received.

6. **Implementation:** The Living Longer and Stronger in West St. Paul (LLS WSP) partnership project is the culmination of the Services Team work to date.

Living Longer and Stronger in West St. Paul (LLS WSP) is dedicated to building on the strengths of its partners and residents to connect people with the resources they want and need to remain active and engaged in the community. Nearly 30 LLS WSP partners have been meeting monthly since October 2009. Partners created an organizational agreement, elected a board and officers and hosted a community kick-off event on October 23, 2010. As LLS WSP proceeds, its focus is on developing more informal and quasi-formal support networks, recruiting volunteers who can provide services, and refining a process for sharing volunteers, referrals and resources.

Transportation

The overall focus of the Transportation Team was to improve transit mobility services in Dakota County. The goal of the team was to streamline transit services in Dakota County. To that end the scope of the Transportation Team was:

1. **Inventory:** conduct an inventory of existing transit providers including those using volunteer drivers in Dakota County.
2. **Assess:** complete an assessment of any gaps in mobility services.
3. **Coordinate:** convene providers of transit services in a structured process to identify opportunities for coordination, service improvements and redundancies.
4. **Implement:** develop an implementation plan to improve service and mitigate redundancies.

A complete review of the outcomes of the Transportation Team can be found on the [LLS documentation website](#) in their final report document.

Actual outcomes for the Transportation Team include:

1. **Inventory:** a comprehensive inventory of transit providers was completed. The inventory outlined each provider's area of coverage, capacity (number of vehicles), volume (numbers of rides annually), funding models and annual operating budget.
2. **Research:** a literature review of transit providers was conducted and specific related information outlined.
3. **Gap Analysis:** potential gaps in mobility services in the County were assessed. Detailed maps of population density, transit availability and residents with mobility concerns were produced and reviewed.
4. **Let's Talk Transit Forum:** in July 2009, providers of transit services in Dakota County attended a transit forum to learn about demographic expectations and to envision mobility services for the aging population. Key topics of the forum included:

- a. Vision themes for discussion and definition
- b. Barriers to vision and how to overcome them
- c. Opportunities/Priorities for the Transportation Team going forward
5. **Work Plan:** the forum provided information for development of a work plan for the next year for the Transportation team. Major objectives of the plan included:
 - a. Link land use and transit
 - b. Coordinate transportation services
 - c. Use volunteers for transit services where appropriate
6. **Implementation:** the Transportation Team applied resources to the following activities critical for implementing the work plan:
 - a. Land Use: the connection of land use and transportation emerged as the most critical issue at the July 2009 Transit Forum. An Eagan City planner joined the team and land use/transportation recommendations were developed. An ad hoc group of Dakota County, city and agency staff was formed in 2010 to work on land use and transit issues.
 - b. Vehicle Coordination: team facilitated communications between Minnesota Department of Transportation and non-profit organizations concerning barriers to the sharing of vehicles. Through the work of the nonprofits, barriers appear to have been lifted.
 - c. Applying Volunteers: team recommended that DARTS develop a program pairing seasoned transit riders with new transit riders to familiarize them with mass transit options in the Twin Cities.
 - d. Communication: Transportation Team coordinated communication and meetings with various state, city, County and business personnel to review transit-oriented development and the work of the team.

The Transit Forum was attended by more than 50 people representing transit providers, cities, public/government (Metropolitan Council, County, state), businesses, community members, and transit users. A goal was to begin developing a shared vision of what future transportation will look like, how it will work and who it will serve.

When Forum participants were asked what action they planned to take as a result of the session, answers included "Continue collaborating;" "Talk about the issue with my church and my other community groups;" and "Better planning for myself as to where I should retire in order to have access to transportation."

Work and Community

The goal of the Work and Community Team was to tap the knowledge, experience and leadership of older adults to serve personal, business and community needs. The Work and Community Team organized around three initial strategies and defined their scope as:

1. **SHiFT Site for Dakota County:** support [SHiFT](#) in launching a site in Dakota County. The SHiFT network supports people in midlife transitions who seek greater meaning in life and work.
2. **Workplace Flexibility:** initiate discussions with selected employers in Dakota County on how to maximize contributions of mature employees for mutual benefit.
3. **Mature Worker Award:** develop an annual award to recognize a Dakota County employer as best employer for workers over 50.

Actual outcomes for the Work and Community Team include:

1. **SHiFT Implementation:** promoted and co-hosted monthly SHiFT sessions from March-December of 2009 at Inver Hills Community College. Each session had an average of 12 attendees.
2. **Workplace Flexibility:** hosted discussions with TapeMark in West St. Paul and Securian in St. Paul about flexible work arrangements for older workers. The economic downturn postponed the team's efforts to schedule additional employer discussions.
3. **Working With Experience Award:** the team worked together to:
 - a. Analyze and research mature worker award programs.
 - b. Develop the criteria, guidelines, application and selection process for the LLS Working With Experience award.
 - c. Coordinate with the Dakota-Scott Workforce Investment Board to promote and present the award to two Dakota County employers. Award winners were also recognized in the *Pioneer Press* and by the Dakota County Board of Commissioners.

The Working With Experience Award, handcrafted by a mature woodworker, was presented to the City of Apple Valley Parks and Recreation Department and Kowalski's Eagan Market for encouraging intergenerational and flexible work opportunities.

Advisory Committee

In addition to the six theme team leaders and launch team members, the LLS Advisory Committee was composed of volunteers from a variety of sectors (public, business, health care, faith communities, and nonprofits), a senior staff person from Dakota County and a board member from DARTS. The group was established at the start of the second year of the initiative and had purely an advisory role.

The actual outcomes of the Advisory Committee include:

1. **Strategy Integration:** heard and reacted to project status reports from each of the six theme teams, applying a broad perspective not steeped in any one theme area.
2. **Visioning:** reviewed how well the projects served the overall LLS vision and made observations about how the various projects could intersect and positively influence each other. The Advisory Committee also advised on vision statement revisions.

3. **Problem Solving:** suggested resources that could support a project; made connections (e.g., provided introductions or contacts to advance a project); shared expertise to further the process.
4. **Communication:** disseminated information and promoted LLS to their constituents and networks.
5. **Decision Making:** advised and reviewed team streamlining decisions and established the Sustainability Committee.

Sustainability Committee

The LLS Sustainability Committee was established in late 2009 to develop a continuity strategy for 2011 and beyond. It was “seeded” with members from the Advisory Committee and the Theme Teams. Additional participants were brought in for their specific expertise. The focus of this committee was to create the vision, foundational statements and structural options for LLS going forward.

The outcomes from the LLS Sustainability Committee are:

1. **Assessment:** conducted an internal analysis of the value of LLS to the community.
2. **Research:** reviewed literature and conducted telephone interviews of community partnership models, communities for a lifetime examples and sustainability strategies of similar initiatives nationally.
3. **Foundation Documents:** refined the Vision and Mission, and articulated the Purpose and Values of LLS based on the learning from the initiative to date.
4. **Structure Options Analysis:** developed a matrix of organization structure and partnership scenarios and evaluated them based on resource realities and probability of success. Recommended that an independent nonprofit organization be formed; this recommendation was later tabled.
5. **Business Planning:** drafted articles of incorporation and bylaws for the recommended go-forward structure. Began a detailed business plan to define further the possible organization structure, budget, SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) and community engagement model needed to sustain the LLS initiative.

RECOMMENDATIONS

Each of the six Theme Teams compiled a list of recommendations for their issue areas. The Advisory and Sustainability Committees and initiative staff also formulated recommendations for the ongoing direction of LLS as an initiative.

Initiative Recommendations

The following overarching recommendations for the LLS initiative include:

1. **Tools, Best Practices:** Build on the accomplishments of LLS by using and refining the tools and data developed during the initiative.
 - a. Surveys
 - b. Data collection tools (questionnaires, dialogue outlines, interview tips)
 - c. Assessment tools

- d. Statistical data, maps, and charts produced by the theme teams
 - e. Living Longer and Stronger website
2. **Community Engagement Model:** Sustain and enhance the community engagement model and the established volunteer base.
- a. Diversify the ethnic, economic, and geographic mix of engaged participants and entities.
 - b. Ensure community residents and subject matter experts are well represented on each team.
 - c. Continue community outreach and education of LLS to further engage additional resources to help fill “staffing needs” as projects begin or other resources become unavailable.
 - d. Continue to educate and motivate the volunteers by providing guest speakers, opportunities for cross-disciplinary connections, round table discussions and presentations by all teams to each other.
 - e. Honor volunteers’ needs for substantive and meaningful roles, autonomy and time flexibility.
 - f. Recognize community volunteers in a simple way, acknowledging contributions made and expertise. Consider public acknowledgement venue.
3. **Cross-Functional Teams:** Maximize the value of cross-sector and cross-functional teams comprised of subject matter experts, resident volunteers, County staff, process managers and initiative leadership. Agreement on priorities, timeline, resources and approach, which may shift during the lifetime of the initiative, will ensure success.
4. **Communication:** Leverage communication resources from all key partners to broadcast initiative progress, successes and needs.
- a. Develop and execute an adaptable communication plan for educating the general public about LLS and the related projects and programs being developed and available.
 - b. Maintain a single, user-friendly website of easily accessible information for many audiences.
5. **Funding:** Expand and diversify the funding model.
- a. Establish and review the overall funding model and budget requirements for each project as it is defined.
 - b. Consider creating a subcommittee specifically tasked with grant writing or fund raising across all projects.
 - c. Seek additional local, state and federal funding as well as business sponsorships.
 - d. Resource sharing across teams and projects may reduce overhead needed for implementation.

Theme Team Recommendations

The following recommendations are specific to the projects initiated or implemented by each of the theme teams.

Finance:

1. Mapping Your Retirement could be offered in smaller group settings (e.g., in private homes for neighborhood groups).
2. Comprehensive course in personal finance should be taught in school and a requirement for graduation.

Health and Wellness:

1. Senior/Community Centers must work with their participants and the larger community to maintain relevant programming and services that continually meet the community's changing needs.
2. Continue gathering information from current and future participants to use in establishing priorities for program changes and for work with staff and funders to find the resources to make the necessary changes.

Housing:

1. Advocacy for proactive zoning practices should be coordinated through an advisory group and focus on each individual city/community.
2. Coordination between housing developers and transportation providers is critical. Develop 'walkability score' in new housing developments.
3. Educate the public about universal and livable design, housing and land use and how to engage in the decision making process.
4. Create a demonstration house for universal design.
5. Develop process for livability assessments using volunteer and paid assessors.

Services:

1. Continue to use and refine the Services model and replicate the LLS WSP community partnership project in additional cities and communities.
2. Survey people receiving services in the formal and quasi-formal service system about what their needs are and how, where, and by whom they want to receive services in order to prioritize development of the INFORMAL services system in each community.
3. Develop methods to encourage community organizations to share referrals, volunteers and resources.
4. Create a community resource book available in a print format and on a city website.

Transportation:

1. Coordinate land use decisions and transportation across cities and agencies.
2. Specific areas within the County should be developed with a density to support transit services and pedestrian amenities to facilitate walking to services.
3. Use the Cedar Avenue project as an example of state of the art complete streets and transit oriented development practices.
4. Use the Robert Street project in West St. Paul as a demonstration of transit-oriented design principles.
5. Further define improvements for transit providers: transit services not constrained by County lines; mix of transit services based on needs of residents; eliminate fragmentation of transit services.

Work and Community:

1. Continue the Working With Experience Award and capitalize on it by creating an award for volunteer-based community service.
2. Create a community bartering pilot using a time bank.
3. Highlight stories about the contributions of older adults through different local media channels.
4. Develop an intergenerational civic project and encourage mentoring opportunities.

LESSONS LEARNED

The following lessons/opportunities for improvement have been identified by the team members and leadership from the LLS initiative:

1. **Roles and Responsibilities:** Need to be clearly defined and reviewed as the initiative and projects proceed. Lack of clear understanding of the roles and empowerment level leads to delays in implementation and frustration across the teams.
2. **Priorities and Deliverables:** Need to be defined and agreed upon across all levels of the initiative. Each team has multiple directions and possibilities for projects. Agreement on the priorities ensures consensus and feasibility of implementation.
3. **Delivery Timelines:** The fluidity of the community engagement model and the fluctuation of resources needs to be fully realized in the milestones and timelines established for each project. A longer-term time horizon overall would better support the ongoing and evolving nature of this work.
4. **Engagement:** County, city, experts and volunteer engagement needs to be sustained throughout the initiative. A win-win opportunity exists when skills can be leveraged and new networks acquired.
5. **Funding:** Lack of funding structure was seen as the biggest obstacle for implementation of projects across the teams. Additional resources or a solid fund development process is needed for project implementation.
6. **Leadership:** Ongoing strong leadership is needed to continuously define the objectives, maintain overall focus, and adapt the infrastructure needed to sustain the work.
7. **Team Structure and Communication:** More cross-team connections and communication will help ensure there are no gaps or duplicative efforts across the projects. Team members can be leveraged based on expertise and availability.
8. **Volunteer Experience:** The community engagement model was well accepted by the volunteers and should be sustained. Continue and enhance the education, mentoring and networking opportunities to make the volunteer experience even more engaging.
9. **Public Awareness:** Investing in broader community education and awareness efforts throughout the course of the initiative would create a pipeline for new participants, build overall momentum, and provide avenues for ongoing feedback from stakeholders.
10. **Infrastructure:** Need to invest in and develop an infrastructure to support LLS projects in the future. Organization support structures, website development, grant writing, etc. need to be included as the LLS initiative and project implementation move forward.

APPENDICES

Financials

Expense Category	2008	2009	2010	Total
Salary and Benefits	\$59,965	\$74,642	\$76,318	\$210,925
Direct Supervision, Clerical Support and Administration	\$24,651	\$36,355	\$34,085	\$95,091
Travel and Training	\$1,264	\$4,135	\$1,399	\$6,798
Office Supplies and Postage	\$1,906	\$1,092	\$675	\$3,673
Community/Stakeholder Meetings and Volunteer Support	\$1,302	\$2,146	\$2,481	\$5,929
Vendor Printing, Graphic Design	\$1,476	\$232	\$505	\$2,213
Advertising and Event Promotion	\$3,164	\$248	\$276	\$3,688
	\$93,728	\$118,850	\$115,739	\$328,317

Note: These financials do not include an allocation for indirect costs. Nor do they include the value of time and in-kind resources contributed by organizational partners and individual participants.

Volunteers

People were the most important resource for the LLS initiative. What follows are the names of volunteers who participated in the theme and administrative teams documented in this report. In addition, numerous others worked on projects, participated in focus groups and forums, staffed LLS information tables and in other ways volunteered their time and skill.

Deborah Tompkins, DARTS Community Initiative Director, was the key staff leader of LLS throughout the three-year project, with support from Dakota County Office of Planning and Analysis staff liaisons Debra Ehret Miller and Jane Vanderpoel.

Finance Team Members

Maura Albrecht	Financial Advisor, Team Leader 2010, Burnsville
Mike Garrison	Community Volunteer, Team Leader, Apple Valley
Debra Ehret Miller	Dakota County Office of Planning and Analysis
Gary Embretson	Community Volunteer, Apple Valley
Jan Embretson	Community Volunteer, Apple Valley
Jim Morgenstern	Financial Advisor, Rosemount
LaDonna Boyd	Dakota Electric Association, Farmington
Marion Brown	Community Volunteer, Apple Valley
Sandra Araujo	Postal Credit Union, West St. Paul
Scott Shull	Financial Advisor, Burnsville
Sharon LaComb	Dakota County Technical College Foundation
Denis LaComb	Community Volunteer, Apple Valley
Stacey Bartelson	Financial Advisor, Rosemount

Health and Wellness Team Members

Loudi Rivamonte	City of Eagan, Team Leader 2010
Alison Hanson	Community Volunteer, Eagan
Amber Jacobson	Community Services Specialist, City of Burnsville
Ann Naithani	HealthEast
Bridget Doyle	Community Volunteer, Eagan
Bud Hartfiel	Community Volunteer, Apple Valley
Dawn Kinnunen	Community Volunteer, West St. Paul
Debbie Hedges	Community Volunteer, Eagan
Debra Ehret Miller	Dakota County Office of Planning and Analysis
Ellen Bromley	Amherst H. Wilder Foundation
Jane Vanderpoel	Dakota County Office of Planning and Analysis
Joanne Boyd	Community Volunteer, Apple Valley
Kay Rolfzen	Augustana Care
Marian Brown	Community Volunteer, Apple Valley
Mary Montagne	Dakota County Public Health
Michele Starkey	Burnsville Senior Center
Nan Just	SouthEast Metro SAIL
Phil Heide	Community Volunteer, Eagan
Ryan Hetlund	Community Volunteer, Apple Valley

Housing Team Members

Haden Bowie	Humphrey Institute of Public Affairs Student, Team Leader 2010
Kristi Johnson	Humphrey Institute of Public Affairs Student, Team Leader
Mike Wold	Community Volunteer, Team Leader, Eagan
Alissa Boroff	Access Solutions, Augustana Care
Anna Spangler	Community Volunteer, Burnsville
Barb Blumer	Community Volunteer, Eagan
Bob Erickson	Community Volunteer, Lakeville
Brendon Slotterback	Dakota County Office of Planning and Analysis
Catherine Bondhus	Walker Methodist
Cheryl Jacobson	Dakota County Community Development Agency
Christi Fletcher	Highview Hills by Walker, Lakeville
Colleen Fritsch	DARTS
Gary Hansen	Eagan City Council
Kristen Edson	Walker at Westwood Ridge, West St Paul
Mary Sullivan	Community Volunteer, Apple Valley

Services Team Members

Jim Loving	Community Volunteer, Team Leader 2010, South St. Paul
Leu Killion	Fairview Ridges Hospital, Team Leader
Barb Eschle	Thompson Park Activity Center, West St. Paul

Becky Wilken,	Touching Hearts at Home, Eagan
Eunice Neubauer	Choice Connections, Inver Grove Heights
Howard Schneider	Dakota County Office of Planning and Analysis
Judy Fairbrother	DARTS
Kam Aggarwal	Peaceful Mind Homes, Eagan
Louise Starr	Dakota County Social Services
Mary Nordtvedt	Augustana Lutheran Church, West St. Paul
Milt Conrath	Community Volunteer
Nan Just	SouthEast Metro SAIL
Pat McMurray	Community Volunteer, West St. Paul
Sandra Araujo	Postal Credit Union, West St. Paul
Scott Hemenway	Visiting Angels, Burnsville
Vicki Gerrits	Lifeworks, Inc.

Transportation Team Members

Kathy Fischer	Community Volunteer, Team Leader 2010, Eagan
Janet Lekson	Community Volunteer, Team Leader, Rosemount
Bob Platz	Lifeworks, Inc.
Clyde Thurston	Community Volunteer, Eagan
Dan Krom	Dakota County Transit Office
Dan Patterson	Dakota County Office of Planning and Analysis
Don Gudmundson	Dakota County Sheriff
Joe Morneau	Dakota County Transit Office
Kevin McCaleb	Midwest Special Services
Kevin Raun	DARTS
Kurt Chatfield	Dakota County Office of Planning and Analysis
Lynn Moratzka	Community Volunteer, Hastings
Mike Ridley	Planner, City of Eagan
Rob McDonough	DARTS
Ruthe Batulis	Dakota County Regional Chamber of Commerce
Sam O'Connell	Dakota County Transit Office

Work and Community Team Members

Jean Dale	Community Volunteer, Team Leader 2010, Eagan
Tracy Donovan	Community Volunteer, Team Leader, Farmington
Barbara Obershaw	Community Volunteer, Team Leader, Lakeville
Caron Hassen	Dakota County Workforce Center
Colleen Fritsch	DARTS
Gil Kinnunen	Community Volunteer, West St. Paul
Howard Schneider	Dakota County Office of Planning and Analysis
Jane Stubblefield	Community Volunteer, Apple Valley
Jayne Hager Dee	University of MN Extension Office
Lori Terhaar	Community Volunteer, Eagan

Margo Danner	Community Volunteer, Eagan
Mark Jacobs	Dakota-Scott Workforce Investment Board
Tim Andrews	Community Volunteer, Lakeville

Launch Team

Clyde Thurston	Community Volunteer, Team Captain, Eagan
Gil Kinnunen	Community Volunteer, West St. Paul
LaDonna Boyd	Dakota Electric Association
Milt Conrath	Community Volunteer
Sharon LaComb	Dakota County Technical College Foundation

Advisory Committee Members

Bahgat Elshagher	Community Volunteer, Burnsville
Carolyn Dobis	ProAct, Inc.
Clyde Thurston	Community Volunteer, Eagan
Don Gudmundson	Dakota County Sheriff
Gary Hansen	Eagan City Council
Gil Kinnunen	Community Volunteer, West St. Paul
Jack Ditmore	Dakota County Office of Planning and Analysis
Jack Rolig	DARTS, Board Member
Jim Loving	Community Volunteer, South St. Paul
John Kemp	Neighbors, Inc.
Kathy Fischer	Community Volunteer, Eagan
LaDonna Boyd	Dakota Electric Association
Loudi Rivamonte	City of Eagan
Mary Nordtvedt	Augustana Lutheran Church, West St. Paul
Maura Albrecht	Community Volunteer, Burnsville
Mike Garrison	Community Volunteer, Apple Valley
Mike Wold	Community Volunteer, Eagan
Milt Conrath	Community Volunteer
Nan Just	SouthEast Metro SAIL
Pat Geagan	Community Volunteer, Eagan
Phil Stalboerger	Blue Cross Blue Shield of Minnesota
Sandra Araujo	Postal Credit Union, West St. Paul
Sharon LaComb	Dakota County Technical College Foundation
Tara Donahue Weiss	United Way of Hastings
Tracy Donovan	Community Volunteer, Farmington

Sustainability Committee

Jim Loving	Community Volunteer, Committee Chair, South St. Paul
Beth Wiggins	DARTS
Christi Fletcher	Highview Hills by Walker, Lakeville
Jack Ditmore	Dakota County Office of Planning and Analysis
Jack Rolig	DARTS, Board Member

Jane Vanderpoel	Dakota County Office of Planning and Analysis
Jean Dale	Community Volunteer, Eagan
John Kemp	Neighbors, Inc.
Kathy Fischer	Community Volunteer, Eagan
Louise Starr	Dakota County Social Services
Lynn Moratzka	Community Volunteer, Hastings
Maura Albrecht	Financial Advisor, Burnsville
Maureen Bell	Dakota County Libraries
Milt Conrath	Community Volunteer
Nan Just	SouthEast Metro SAIL
Pat McMurray	Community Volunteer, West St. Paul
Peter Spuit	Minnesota Department of Human Services, Transform 2010
Rajean Moone	Community Volunteer, Apple Valley