

Carver County Baby Boomer Readiness Assessment Tools

Prepared for the Carver County Office of Aging

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Table of Contents

Introduction.....	3
Review of Literature	6
Resident Focus Groups	15
Focus Group Format	15
Results	16
Urban Form	23
Staff Focus Grou.....	25
Focus Group Format	25
Results	25
Service Provider Interviews.....	32
Alan Herrman, Carver County Transit (CART).....	32
Barb Johnson, Catholic Charities Caregiver Support Program	34
Gay Matson, Community Education, Watertown-Mayer School District	35
Andy Schultz, Community Relations, Good Samaritan-Waconia	36
Paula Borer, Ridgeview Medical Center Home Health Care Services...	38
Deb McMillan, Chaska Area Chamber of Commerce	39
Creation of the Community Survey Instrument	41
Creation of the Baby Boomer Community Readiness Assessment Instrument	42
Works Cited	44
Appendix A: Watertown and Mayer Resident Background Questionnaire—Aggregated Results.....	45
Appendix B: Resident Focus Group Discussion Guide	49
Appendix C: Carver County Community Survey	51
Appendix D: Government Staff Background Questionnaire— Aggregated Results	65
Appendix E: Government Staff Discussion Guide.....	67
Appendix F: Baby Boomer Community Readiness Assessment Instrument	71

Introduction

The population of Carver County, Minnesota will soon undergo an historic demographic shift. Although county residents ages 65 and older currently number roughly 6,000, their numbers are expected to more than *quadruple* over the next two decades, reaching 25,000 by the year 2030. In addition, research suggests that the baby boomers who will make up this “age wave” will differ greatly from previous generations in more ways than numbers. According to a brochure produced by the Carver County Office of Aging, some differences between retired boomers and older retirees will likely include:

- Increased quality of life/health
- Increased level of education
- More affluent
- More traveled (out of country)
- Increased professional level
- Larger number of working women
- Larger number of women drivers
- Two income families
- Fewer children
- Children will be more geographically disbursed
- Increased rates of divorce
- Marriages later in life
- More plan to continue working
- More women have handled own finances
- Fewer people with pensions
- More communal living experiences
- More formal exercise experiences
- Less disability
- Psychologically and emotionally aware
- Actively involved and advocate for own health care needs
- Many more do-it-yourselfers
- Increased number of people interested in volunteering
- Fewer smokers
- Technology savvy

Current research indicates that a Sunbelt-bound exodus of baby boomers is unlikely, and that most aging boomers will prefer to “age in place,” remaining in their current communities. The size, skills, and economic clout of the baby boomer generation will make planning to retain boomer residents critical for

Carver County in the coming years. In addition to planning for boomers, Carver County faces important decisions about its future growth and development as it never has before.

Planning for the aging of the baby boomer generation is a question of planning the types of communities boomers will want to age in. To determine what such communities might be in the context of Carver County, and to determine how the county's current communities, plans, and services measure up, the Carver County Office of Aging engaged the services of Community Growth Options (U-CGO), a joint program of the Center for Urban and Regional Affairs (CURA) and the Hubert H. Humphrey Institute of Public Affairs at the University of Minnesota, to create community assessment tools that could be used to assess the needs and preferences of Carver County boomers and the readiness of Carver County communities to meet these needs and preferences.

The project resulted in two assessment tools: a resident survey and a baby boomer readiness assessment instrument. The resident survey (Appendix E) was developed based on a review of literature on the characteristics of the baby boomer generation, as well as a series of focus groups with baby boomer residents of Carver County. The purpose of the survey is to help communities in Carver County and elsewhere assess the needs and preferences of baby boomer residents as they approach traditional retirement age.

The baby boomer readiness assessment instrument (Appendix F) was based on a review of literature on the challenges of planning for an aging community and the characteristics of the baby boomer generation, as well as a series of interviews with a range of service providers in Carver County and focus groups with planning and city administration staff from various communities in Carver. The assessment instrument is modeled on a smart

growth audit published by the American Planning Association.¹ The purpose of the assessment instrument is to provide city and township staff with a framework for analyzing how well both the current form and the planned future form of their communities meet the needs and wants of their baby boomer residents.

¹ Jerry Weitz and Leora Susan Waldner. *Smart Growth Audits*, PAS 512. Chicago: American Planning Association, 2002.

Review of Literature

Preparation for creating the assessment instrument involved background research aimed at familiarizing U-CGO staff both with the general issues associated with aging and the particular issues likely to grow in importance as the baby boom generation ages. Although the authors of the works we consulted differed on many specifics, they agreed on one point: the aging of the baby boomer generation will be unlike the aging of any preceding generation.

The simplest reason is that no preceding generation has reached its late 60s as such a largely intact generation (Freedman, 1999). Although most boomers who retire at the traditional age can expect a long, healthy retirement—and most do seem to expect one—the idea of a long, healthy retirement is a relatively new one. In fact, 65 was roughly standardized as the retirement age at a time when an American man's life expectancy was 62 years (Crocker, 2007). In contrast, many boomers can expect to spend nearly a third of their lives in retirement (Freedman, 1999). These facts drive home the point that the aging and eventual retirement of baby boomers will bring about a dramatic change in society.

Exactly what that change will mean is more debateable. Expressions of concern about the fate of social security and other such entitlement programs are commonplace in the popular press and popular imagination. Although some of the worries are reasonable—the social security system was designed to operate with a much higher ratio of workers to retirees—many have been inflated by partisan politics. Freedman (1999) also sees vestiges of an ingrained cultural image of older people as passive, infirm drains on society. He points out that such images are something of an historical aberration, first arising in the early industrial era—a time when powerful sectors of society tended to value the common people solely based on their ability to perform taxing, repetitive physical labor. Such images have little relevance today, yet still seem to persist to some degree.

Not only will baby boomers be the most intact older generation in history, upon reaching retirement, they will also be the best educated, with arguably the broadest variety of life experiences. Croker (2007) and Freedman (1999) agree that, because of this fact, retired baby boomers represent a potentially invaluable resource for society. Although many boomers who have the financial security to do so will retire from their current careers at somewhere around the traditional age, many of these skilled, healthy, vital older citizens will not be willing to give up working altogether. Much discussion now focuses on the concept of the “encore career,” viewed as personally fulfilling work undertaken after secure retirement from a youth and middle age of more financially fulfilling work. Such “work after work” may be undertaken either on a paid or volunteer basis. Many boomers will likely have some need for a source of income to supplement savings, social security (to the extent it is available), and pension benefits (for those who have them). However, those who tout it as a major trend claim that the encore career’s defining characteristic is that it is more a result of mature adults wanting useful work than needing the income resulting from it. Croker (2007) cites baby boomers’ history of social activism, high levels of education, and largely post-industrial work experiences—in addition to their general good health—as evidence that their generation will remain much more active and engaged with the world at large than those that have gone before.

Croker (2007) also observes that the consequences for society could be dire if the baby boomer generation *does not* remain active and engaged with the world at large. Sheer weight of numbers seems to bear him out. As Katy Boone of the Carver County Office of Aging said in an early planning meeting for this project, “We can’t afford to lose our boomers.” Some evidence seems to suggest boomers may not stay as active in society as Croker and Freedman claim. Wilson and Simpson (2006), in a 2006 study of civic engagement among baby boomers, point out that boomers are not as involved in society now as preceding generations were at their current age,

particularly in regards to volunteer activity. On the other hand, others have shown that Americans in general are not as involved in society as they were in earlier years.

These conflicting points—both supported by good evidence—both point to what seems to be the pivotal question: Will some sector of society offer aging boomers the right opportunities for continued work and engagement with society? It seems clear that volunteering for the benefit of the community will not mean stuffing envelopes to baby boomers, and that encore careers will need to be challenging and rewarding to attract them. Although such opportunities do not currently seem to be as prevalent as they may soon need to be, Freedman (1999) offers several case studies of successful programs, ranging from community-school partnerships to a Florida free clinic staffed almost entirely on a part-time, volunteer basis by retired doctors. Such programs provide excellent examples of the benefits a cadre of skilled, experienced retiree-volunteers can confer on a community. In addition, where they have been implemented, these programs tend to meet with considerable success in spite of limited resources.

Opportunities for work and community involvement will only matter to retired boomers if they have sufficient mobility options to access them with relative convenience. Although boomers have the highest automobile ownership rates of any generation yet on the cusp of retirement, and although most boomers will likely not be prevented from driving by reasons of physical health for many years, the current automobile-dependent transportation system raises several worrisome issues concerning the baby boomer generation's long-term mobility. Even though most people over age 65 are quite capable of driving, levels of ease and comfort associated with driving diminish with age. In addition, the percentage of mature adults who continue to drive falls off sharply after age 85 (Bailey 2004). The current metropolitan area planning horizon of 2030 means planning for the first baby boomers turning 85. In addition, given the long lead times involved in planning and implementing

transportation projects, the increasing number of older non-drivers in the future should figure heavily in transportation planning. At the regional level, there is little evidence that it does. Ridership forecasts for transit projects, for example, assume that the demographics and built form of a community are fixed, in spite of overwhelming historical evidence to the contrary, and generally no attempt is made to consider basic trends such as the statistical near-certainty of a significant increase in older non-drivers, or even the empirical fact of escalating gasoline prices. The strong, long-term upward trend in fuel prices underscores an additional key limitation on driving for older Americans: cost. Even in terms of a car owned outright, the costs of insurance, maintenance, and fuel are large for a person living on a fixed income. Replacement of a car worn out by heavy, daily use can be a serious financial burden in such circumstances. Even mature adults who are physically able to use a private automobile as their primary means of transportation could benefit significantly from living in communities that do not require them to do so because of the nature of the built form or the lack of other transportation options.

According to the Surface Transportation Policy Project (2008), where good options for mobility other than the automobile are available, older adults take advantage of them. The issue here is that viable options for alternative transportation simply do not exist in most areas. As of 2001, only 49% of Americans reported living in areas served by public transportation, and although a majority of older Americans walk regularly, many areas are so spread out, with such rigid segregation of land uses, that walking is not a viable option for transportation to and from destinations, even for a healthy mature adult who walks regularly (Bailey 2004). This situation seems to present both problems and opportunities for Carver County. Although the county is a mix of rural and suburban landscapes developed at generally low densities, the cores of some walkable communities do exist in the form of the old town centers of cities such as Waconia and Watertown, and communities, like these two, currently at or outside the leading edge of large-scale

suburbanization seem to recognize the value of preserving and expanding such an urban form. In addition, on the public transportation front, the county has potential institutional advocates in SouthWest Transit and Carver County Transit (CART). Due to its opt-out status, focused on service to the Carver County cities of Chanhassen and Chaska, as well as the neighboring Twin Cities suburb of Eden Prairie, SouthWest Transit seems well-suited to the task of extending trunk-line service to more areas of the county. Although CART currently only operates advance-reservation dial-a-ride service, its director, Alan Herrman, foresees a transition to regularly scheduled, fixed-route service in the coming years, with a mix of community circulators, cross-county rural routes, and feeders for SouthWest line-haul services (Herrman, 2008). The County's comprehensive plan also calls for significant expansion of service in the coming years (Carver County, 2008). Such service expansions, particularly in terms of commuter service, could prove quite feasible if older communities just now entering a period of rapid growth and partial conversion from rural town to suburb succeed in guiding their growth into a reasonably compact, contiguous form.

The process through which a rural small town is captured into the suburban orbit of a nearby city can create a special set of challenges for the existing older residents of a community, as well as for the community itself. Salamon argues that small towns and suburbs have inherently different community structures and values; town residents generally think of "home" in a fairly broad sense, often including much or all of their town, whereas suburbanites' concept of "home" seldom extends much past their houses, which they tend to view as much as commodities as places—rungs on whatever ladder of success they see themselves climbing (Salamon, 2003). In many cases of a small town becoming suburbanized, suburbanites do not move into the town so much as next to it, into larger houses on larger lots oriented more toward the main road out of town than towards the old town center. This division between new suburb/exurb and old town can be lethal to the old town (Salamon, 2003).

Based on several case studies, it seems that destructive outcomes can be avoided (for both old-timers and new-comers) by integrating newly arrived residents into the existing town to the greatest extent possible, both socially and spatially. In all of Salamon's case studies, where some degree of beneficial coexistence was reached—and the old town in question succeeded in maintaining most of its unique identity—a significant number of new residents lived in town, and the traditional Midwestern built form present there served to help orient the social and commercial lives of new-comers toward the existing downtown. Such circumstances make frequent, day-to-day interaction between old-timers and new-comers impossible to avoid, and help build social networks between them (Salamon, 2003).

Although she uses the term "old-timers" to refer to any resident raised in town, regardless of age, Salamon (2003) also makes the point that old-town populations often tend to be older than new suburban populations, and that older town residents generally have a much stronger social and intergenerational support network available to them than do older suburban residents—as long as someone fills the places in the town's social fabric left by young town residents who age or move away. In part, this fact stems from the close family ties and social bonds which prevail in small towns. It also seems to stem somewhat from the compact urban form that also prevails in small towns, with houses oriented to the street, rather than the driveway, and the entire town oriented toward public spaces like main streets and squares, rather than the nearest highway interchange. With most small towns stemming as they do from an era in which close-knit social and intergenerational networks were the norm, the two seem intimately interconnected. Although much of the county is gradually shifting from the rural to the suburban/exurban end of the spectrum, vibrant, intact towns like Watertown are an invaluable asset in the attempt to guide that shift in as positive a direction as possible.

From the start, one of the guiding principles of U-CGO's involvement with the Carver County Baby Boomer Readiness Assessment project has been that effective planning for aging of the baby boomer generation will be less about designing senior centers and delivering traditional "senior services" than about creating the kinds of communities baby boomers want to live in as they age.

For some time, neighborhoods with a walkable scale and pedestrian-friendly streets have been a goal of planners interested in promoting smarter forms of growth. For many of the reasons outlined above, such traditionally designed neighborhoods are seen as creating communities in addition to places. Walkable neighborhoods can also significantly reduce the isolation levels of older adults who do not drive. Bailey (2004) points out that while 53% of older metropolitan Los Angeles residents who do not drive stay home on any given day, only 35% of metropolitan Philadelphians do so. Given that her figures are at the metropolitan level, and, one assumes, include significant areas of post-war automobile suburbs in Philadelphia, as well as at least some areas of older, more pedestrian friendly urban neighborhoods in Los Angeles, the contrast in mobility levels of mature adults is likely even starker at the neighborhood level. In addition, the medical profession's recognition that moderate amounts of walking for daily transportation can have significant health benefits (particularly for older adults) suggests that the "active living" made possible by fairly compact, pedestrian-friendly neighborhoods can actually help maintain and even improve the inherent mobility of older residents in addition to providing them with an additional option for mobility.²

Many community assessment tools related to aging friendliness currently exist. These tools—generally in the form of a community survey—are often available online, either from the advocacy groups which drafted them or the local governments which have used them. Two striking features of these

² Bailey, 2004.

existing assessment instruments are their high levels of similarity, regardless of where (or if) they have been applied, and a tone of writing that makes it clear to the reader what the author's idea of the "correct" answer is to each question. Although undoubtedly based on much painstaking, legitimate research, these community surveys seem less interested in determining what type of community older residents believe they would benefit from than in determining how closely a given community conforms to what the authors believe older residents would benefit from.

Roberts, et al. (2007) offer something of an exception to the above trend in their community assessment surveys for "Boomers Leading Change." Their survey is long and fairly detailed, and seeks to get at respondents' underlying reasons for their attitudes and desires by having them rate various aspects of broad topics such as volunteering and continuing education on a scale of "very important" to "not important." It is worth noting that, although other assessment surveys studied included rating scale questions, they generally asked for a rating of the existing community rather than a rating of the respondents attitudes to various community attributes. In addition, other surveys' rating scales generally used a scale of "excellent" to "poor," rather than the Boomers Leading Change survey's "very important" to "not important." This practice seems to presume normative value judgments about issues over which there may be significant, legitimate differences of opinion in the community. Such value judgments may tend to skew the results of a survey away from real community attitudes, and, in some cases, discourage some community members from participating if they do not agree with (or understand) the survey's characterization of a specific issue. Although somewhat narrower in scope than the Carver County project—Boomers Leading Change focuses specifically on volunteerism and community involvement, to the exclusion of broader planning topics such as housing and transportation—this survey seems to offer a valuable approach to achieving some depth of information from a broadly-distributed, written community survey. The report also includes surveys targeted at institutions

offering opportunities for continuing education, employment and volunteer work. These surveys mostly ask basic background information about numbers of older adults involved in each organization, and what—if anything—respondent organizations do to attract and/or accommodate older adults. The organization surveys do not include rating-scale questions like the community survey.

In sum, the aging and eventual retirement of the baby boom generation will bring about a critically important demographic shift over the coming decades. Although it seems clear that traditional models of providing “senior services” will not be adequate to meet the needs and desires of baby boomers, it is not clear exactly what models—or even definitions of services, community amenities, etc.—will be appropriate. Numerous “aging friendliness” and related community surveys do exist, but while undoubtedly springing from the best of intentions, most of these existing assessment tools seem to assume too much about what the “right” answers are. Because uncertainty about Carver County boomers’ needs and wants is one of the driving forces behind the project at hand, we decided the only way to be reasonably sure of developing an assessment instrument that accurately addresses those needs and wants is to begin by directly asking members of the communities involved what they are.

Resident Focus Groups

Because a key component of the Carver County project is to determine if the county's mix of community characteristics, services, and amenities create the types of communities Carver County's baby-boomers want to live in over the coming decades, we conducted a series of focus groups with residents of Mayer and Watertown, two smaller communities in Carver County. To prepare for the focus group process, and to hone the draft discussion guide, we conducted a mock focus group on September 24, 2008, at CURA. Graduate research assistants Kate Boran Aitchison and Andrew Guthrie moderated the group, and several CURA employees played the roles of participants. Although none of the group participants actually lived in Carver County, all but one were in fact baby boomers, and all were asked to role-play from the point of view of a Watertown, Minnesota resident. Based on the mock focus group, Aitchison and Guthrie reworked the discussion guide for clarity, and drafted a set of ground rules for the discussion to be read to participants at the beginning of each focus group.

Focus Group Format

In November of 2008, Guthrie and Aitchison conducted a series of focus groups with boomer residents of the cities of Mayer and Watertown. Each focus group was composed of 6 to 10 community residents, with either Aitchison or Guthrie serving as moderator. The initial plan was to divide groups into the older and younger halves of the baby boomer generation (people born from 1946–1954 and 1955–1964, respectively). In Mayer, a poor turnout led to the two groups being combined in the interest of achieving a large enough focus group; the Watertown groups were separated as planned.

Upon arrival, each participant was asked to fill out a questionnaire asking for basic demographic and background information (Appendix A). A discussion guide (Appendix B) was used to guide the focus groups. The questions on the discussion guide were deliberately kept general, both to avoid making

assumptions about participants' views, and to cast the net as wide as possible in stimulating discussion among the community residents present.

Results

Although the answers summarized below do not represent the range of views of all baby boomers in Carver County, they were invaluable in guiding the content of the community survey and boomer readiness assessment tools, and they offer an interesting window into the wishes, hopes, and concerns of the participants. Responses were aggregated to protect anonymity.

1. How long have you lived in this community? What initially brought you here?

→ Follow-Up: What has kept you here?

Residents had lived in their communities between 14 years and all their lives. Especially in Watertown, older residents also tended to be longer time residents. Reasons for moving into the community included moving closer to jobs, moving closer to family, affordability of housing at the time of the move, and a desire on the part of several residents raised in small towns to move back into one. Participants cited small-town atmosphere, rural character, high quality of life, and networks of family and friends as reasons for staying. Several residents considered their communities as offering a good blend of quiet country life and access to the Twin Cities.

2. 10 to 15 years from now do you see yourself still living in this community?

→ Follow-Up: What changes would you make to the community? What type of community would you rather live in?

With the exception of the younger group of Watertown residents, nearly all participants said they intended to remain in their communities permanently, or at least as long as possible. Interestingly, roughly half of the younger Watertown group intended to move somewhere else after retirement. Numerous residents of both communities, and Mayer in particular, mentioned

that they hoped to see more basic services and stores, especially basic medical services and daily-needs retail. Several mentioned the inconvenience of traveling to Waconia for many basic services, particularly medical services, and cited this need to travel as a significant problem for older adults with mobility limitations. In addition, several participants expressed hope for increased economic development in their towns so that they remain something more than a simple bedroom community.

3. Ten years from now, do you see yourself still living in the same place?

→ Follow-Up: What physical changes would you make to your home? What type of home would you rather live in?

Nearly all participants of all three groups had strong intentions of remaining in their current homes as long as possible, although most had concerns about stairs. Almost all lived in two-story houses, even those who had built houses with the specific intention of aging in them. Most anticipated physical changes to their homes would be necessary to deal with the problems of stairs, including rearranging rooms to put basic everyday functions all on one floor, moving washer and dryer from basement to main floor, or adding chair lifts along stairways.

Some mentioned moving to a one-story home if they ever moved. It should be noted that most participants had no plans to move out of their current homes. In Mayer particularly, group members assumed that they would remain in their current homes as long as possible.

4a. What does the phrase maintaining your independence mean to you?

4b. How important is it to you to maintain your independence in the future?

Most participants considered *independence* to mean “not having to depend on other people for daily needs.” Several recognized this as being potentially

at cross purposes with their hope of remaining in their current, single-family homes, largely due to maintenance needs. Many mentioned transportation as the key limiting factor in terms of maintaining independence. A number expressed concern that losing the ability to drive would mean the end of their independence. One cited sufficient financial independence to remain in his current home as a concern.

All participants considered maintaining their independence as critically important. One group participant considered it “just a cultural thing” among Americans in general, and Midwesterners (especially small-town Midwesterners) in particular.

5. *In 10 to 15 years, what types of transportation options would you like to be available in your community?*

In all three of the groups, the first person to speak called emphatically for a transit option in their community, and two of those three individuals expressed a hope for light-rail transit service at some point in the future. Although several participants expressed doubts that LRT would reach their communities within their lifetimes, everyone agreed on a real need for quality, convenient, dependable public transportation as their communities grow and their generation ages.

Few participants seemed aware of current CART demand-responsive mobility bus services. However, many of the participants were likely too young and able-bodied to meet CART’s eligibility criteria. Even so, those who were aware of the service considered it wholly inadequate for meeting future service demand.

Many residents expressed strong desires for improved pedestrian accessibility in their communities, which they considered to mean having basic retail and service needs within walking distance of residential areas (rather than improvements to existing pedestrian facilities).

Bicycle ownership was quite high among participants; roughly three-quarters of the participants rode at least occasionally. Most seemed to ride primarily or exclusively for recreation or fitness. However, a number expressed interest in cycling for practical transportation to destinations as far as Waconia (roughly seven miles from Mayer, ten from Watertown) if they did not have to share highway rights-of-way with high-speed motor traffic. Existing trails were seen primarily as recreational amenities, largely because none of them offer access to actual destinations. Planned trails offering links to Waconia and other communities were seen as transportation infrastructure as well as recreational amenities. In fact, this potential to offer practical transportation was seen as a major benefit of several planned trails over the existing trail systems in both Watertown and Mayer.

6. *In the future, do you think your standard of living will increase, decrease or remain about the same?*

Given the economic situation in late 2008 when these focus groups were conducted, participants were not sanguine about their future standard of living. Although several participants believed their standards of living would remain roughly the same in the future, most were not so hopeful. A number mentioned that the current economy had significantly delayed their planned retirement—some by more than five years.

7. *Do you envision yourself continuing to work—whether for pay or not—beyond traditional retirement?*

→ Follow-Ups: What type of work would you like to do? How often would you like to work? Where might you volunteer?

Nearly all participants indicated that they intended to continue working or volunteering past traditional retirement age. Most, in fact, indicated they planned to continue working at a paid job considerably past age 65, although many planned on cutting back to a part-time schedule.

Several stated that, although receiving some income from part-time, post-retirement work would be important to them, it would be equally if not more important to be working in a job they found personally fulfilling. Several participants hoped to volunteer at local schools. Most participants cited a desire or need to have something to do as a key reason for their plans to continue working.

Several participants cited the current economic situation as having likely postponed their retirement from current jobs significantly. Some indicated willingness to continue in their current jobs for some time after age 65, if able to cut back to a part-time schedule.

8. What types of community-based resources would you like the community to improve on or provide to you in the coming 10 to 15 years?

→ Example: Community education courses, trails, parks, rec. centers, etc.

(The answers to questions 8 and 9 overlapped significantly, and are therefore reported together.)

9. What type of consumer-based services would you like the community to improve on or provide to you in the same period of time?

→ Example: Grocery delivery, bank services, healthcare, yard services, etc.

The need for transportation was reiterated, particularly providing a level of daily mobility sufficient for people no longer able to drive (or no longer comfortable driving) to remain reasonably independent. A need for basic, non-emergency medical services close by was also reiterated by several participants as something that would make it much easier for large numbers of older adults to remain in towns like Watertown and Mayer.

Despite the great differences in the health of their respective downtowns, participants in both communities desired the opportunity to do basic shopping in town, without having to drive to a Target 10 miles away. In Mayer, a grocery store was seen as the greatest retail need; in Watertown, retail opportunities other than groceries and hardware (both of which are already available) were desired along Lewis Avenue—especially a basic clothing store.

In general, participants seemed to consider questions 8 and 9 as much in terms of services needed or likely to be needed by the community as a whole as by older adults in particular. For example, two of the groups mentioned a need for meaningful recreation and part-time employment opportunities for community teens. People saw retention and engagement of youth as critical to the growth and maintenance of a strong community. Participants generally saw the traditional “senior center” as being largely irrelevant by the time their generation made up a majority of older adults in their communities.

10a. *What does the phrase involved in the life of the community mean to you?*

10b. *How important is it to you to be involved in the life of your community in the next 10 to 15 years?*

Attractive, centrally located public spaces were mentioned several times as community features that would help attract and keep a broad variety of people involved in their communities. Although both Watertown and Mayer have parks, participants noted that they were either not located near enough to the center of the community, or were not used enough (either for daily use or public functions) to accomplish the goal of fostering community involvement.

Community festivals and celebrations were also considered important (and too infrequent) by many participants. Such events were seen as a way to reinforce ties between community residents. In addition, community functions were also seen as helpful in integrating newcomers into the social

fabric of the community, and in fostering the sense of ownership and pride in the community that participants believed would stimulate community involvement among newer residents. Answers to this question touched on many issues, ranging from volunteerism to the health of the community as a whole.

11. *Ten years from now, what sorts of recreational and entertainment activities do you see yourself engaging in?*

→ *Follow-Up: Are these available to you now?*

Few, if any, participants anticipated making major changes in the types of recreational and entertainment activities they undertook. Most desired more options for recreation and entertainment within their communities, particularly indoor facilities for physical recreation in the wintertime to avoid having to travel to a neighboring town such as Waconia. One group member suggested opening local school gymnasium facilities to the general public after hours under the supervision of volunteers. Participants in all three groups reported frequent use of existing cycling/walking trails, and desired to see trail systems expanded in the future. Several mentioned a desire for trails with a destination, allowing residents to integrate physical activity into their daily lifestyles through easy, safe, and convenient travel to destinations by foot or bicycle. One Mayer resident suggested a community theater as a means both of providing culture and entertainment within the community, and of helping to foster cohesion among community members. Other participants responded favorably to this idea.

12. *Think over the things we've discussed today; what is one priority you would like the city and county to be aware of as they prepare for a changing population?*

Affordable, available healthcare was a major concern of virtually all participants. Several identified it as an especially great concern in light of the likelihood that most members of their generation would live for several decades after retirement.

The need for improved and expanded transportation options was reiterated by a number of participants in each of the three groups, as well as a future need for a public transportation option in their communities. Several group members mentioned that their generation will not be content to stay home or spend their days at senior centers, but will want to get out into the community at large. Most participants considered themselves likely to become unable to drive or uncomfortable driving long before they would be willing to stop getting out into the community on a more or less daily basis.

In addition, several participants—especially in Mayer—expressed a desire for increased economic development in their communities. Job creation within the community was seen as critical to maintaining community cohesion and identity.

Urban Form

Although there was not a discussion question specifically related to urban form, members of all three groups brought up this issue consistently enough to bear mentioning here.

Many participants cited a desire to maintain the “small town feel” of their communities. However, several also stated that they welcomed growth as something that could keep their communities vital.

In Watertown especially, several participants spoke of the divide between the old and new sections of town. The older areas are oriented inward, are focused on the traditional main streets that traverse the town, and are fully interconnected with other older areas of town. The newer sections of town—subdivisions built on former farmland—are oriented to the roads used by commuters to gain access to the Twin Cities and its western suburbs. Several participants, particularly in Watertown, spoke about newer residents and residents of newer parts of town not “putting down roots”—that is, using the

city as a bedroom community until they were able to afford more expensive housing in a more “desirable” community. Participants viewed new residents as being almost universally commuters, and as hardly ever patronizing local downtown businesses.

Although many residents noted the limited range of businesses available in their communities, many also hoped their communities would maintain or increase the strength of their traditional downtown commercial districts. Several residents also expressed concern at the way the layout of more recent residential subdivisions kept new residents from being integrated into the community the way previous new arrivals had been.

Staff Focus Groups

In April of 2009, graduate research assistant Erik Cedarleaf Dahl conducted a focus groups with city staff from cities around Carver County. The answers summarized below helped to guide the content of the baby boomer readiness assessment tool.

Focus Group Format

The staff focus group was composed of approximately eight city staff from cities around Carver County, with Dahl serving as moderator. The staff focus group took place at Waconia City Hall in April 2009.

Upon arrival, each participant was asked to fill out a questionnaire asking for basic demographic and background information (Appendix C). A discussion guide was used to guide the focus groups (Appendix D). The questions on the discussion guide were deliberately kept general, both to avoid making assumptions about participants' views, and to cast the net as wide as possible in stimulating discussion among the community residents present.

Results

Although the answers summarized below do not represent the range of views of all government staff in Carver County, they were invaluable in guiding the content of the community survey and boomer readiness assessment tools, and they offer an interesting window into the perspectives of the participants. Responses were aggregated to protect anonymity.

1. How long have you been working in Carver County?

Follow up → What has kept you there?

City staff in the focus group worked in Carver County from 9 months to 31 years. A majority of city staff in attendance had worked in Carver County between 10 and 15 years.

City staff explained that they had remained working in Carver County due to career challenge or because they considered Carver County a good place to raise children. All city staff commented on the positive experience of working in smaller communities and the challenge of managing the rapid growth occurring in Carver County.

2. *What characteristics of your (working) city do you think make it attractive or unattractive to older residents?*

City staff from cities around Carver County commented that the characteristics that make their communities unattractive to older residents include limited senior facilities, limited trails, and limited medical facilities. In addition, they noted that some cities in Carver County are seen as expensive places to live and with the economy currently at a standstill this complicates living in Carver County, especially in smaller cities.

City staff commented that the characteristics that make their communities attractive to older residents include senior housing opportunities, subsidized senior housing, assisted senior housing, drug stores, grocery stores, a "social and economic" center, and a place for people to shop and eat. As a whole, this question split the cities down the middle, with larger cities having more services for older and younger residents and thus being more attractive and smaller cities having fewer or no services and thus being less attractive.

3. *Do you think the needs of aging baby boomers might differ from the needs of earlier generations of older people?*

City staff in this focus group recognized that the needs of aging baby boomers differ from earlier aging generations. Several city staff commented that their communities are looking at additional housing closer to the business district/downtown, noting that this is a difference from previous aging generations. City staff also were aware of a key difference among aging baby boomers: that boomers want to and are going to age in their existing homes. They recognized that this means their cities will need to consider how well local regulations accommodate residents who wish to age

in their homes. City staff suggested that the fact that the aging baby boomer generation will be more independent than previous generations opens up the option of creating more market-rate senior housing. The group also agreed that the concept of “nursing home” is changing and is not appropriate for the boomer generation. Staff also recognized that baby boomers will demand more services as they age, and several of the smaller communities wondered how they will meet these new service needs.

4a. *What do you see as your city’s main strengths in adapting to an aging population during the next 20 years?*

City staff saw as strengths the fact that they are beginning to plan now for an aging population, and efforts to help the community and private developers understand the growing need for senior housing as existing housing fills up.

4b. *What do you see as your city’s main weaknesses in adapting to an aging population during the next 20 years?*

City staff agreed that smaller cities on the edge of a metropolitan area do not have economies of scale and thus things are more expensive. Other city staff commented that the main weakness for their communities is that city council members may not have the vision needed to help the city grow to meet the needs of the coming baby boomer generation; city staff can make recommendations, but the city council makes the final decision. Staff from smaller cities commented that it is hard to see how senior housing will be funded in their communities because of their relatively small population and resident desire to keep taxes low. City staff from all communities agreed that housing affordability is going to be the biggest challenge for cities and for baby boomers who have lost much of their savings in the current economic downturn.

4c. What specific opportunities do you see for your city to benefit from the demographic shift to an older population?

A highly energized baby boomer population that is demanding more services and is willing to assist in implementing these services was noted as an opportunity for cities in Carver County. The baby boomer generation is ready to serve and also ready to engage on a higher level due to their education level. City staff agreed this could be both an opportunity and threat. If the baby boomer volunteering opportunities commensurate with their education and skill levels are not available, they are mobile and will find somewhere else to live. All city staff agreed that baby boomers serving other baby boomers within their communities is a critical opportunity that communities must determine how to better facilitate in the coming years. City staff also suggested that the pride and heritage of Carver County communities is an opportunity to facilitate volunteerism and charitable giving.

4d. What specific threats or challenges do you see for your city as it adapts to an aging population?

Challenges and threats focused on the difficulty each city will have in implementing aging committee suggestions and getting enough input from aging residents to rise to the planning challenge proactively. City staff also agreed that not having the financial means to do what is needed to be done in each community to keep baby boomer populations is a serious threat to the livelihood of each community. The final threat discussed is that people on committees planning for the aging boomer population may need to take tough stands to implement unpopular but necessary projects.

5. How suitable is your city's existing and planned housing stock for an aging population?

Follow-up → What constitutes suitable of not suitable for the coming baby boomer generation? How is it different?

City planners agreed that not much suitable housing exists in each of their communities, and many city staff commented that as fast as their communities build housing, they are already behind the curve as far as the city's needs. Many of the city staff in the focus group also commented that there will need to be a stronger effort to help private developers see that this need is real, and that suitable housing is economically viable. All communities stated that their code was amenable to residents modifying current housing to better suit the needs of those who will be aging in place.

6. *What do you think of your city's existing transportation and mobility options ability to meet the needs of the baby boom generation as its member grow older? What steps could be taken to improve the mobility of older adults in your city?*

Follow-up → What can your city do to decrease the need for transit?

Most cities currently rely on CART and Carver County. City staff suggested that they need to do a better job communicating with the county about future transportation plans and needs. City staff also suggested that transportation is going to be one of the biggest and most important issues for the aging baby boomer generation—especially for smaller communities that currently rely heavily on the county for most transportation needs. The focus group participants suggested that meeting transportation needs requires both good design and good planning. Communities need to work on strategies that place aging boomer developments near major collectors or near downtown so their needs can be met through walking or short trips, and consider vertical mixed uses in some areas. All city staff agreed that mass transit is most likely not going to be the answer for Carver County, because there is simply not enough population or density to economically justify or support mass transit. Several staff commented on the importance of assisting grass roots organizations in meeting aging baby boomers' transportation and transit needs.

7. *What effects do you think an aging population will have on your city's economic and commercial life?*

City staff discussed the fact that baby boomers did not go through the depression and have a different attitude about their money than previous generations. The baby boomer generation's attitude about money is closely connected to their self values. The focus group agreed that baby boomers are more likely to spend money on themselves and save less, an extension of the "me" generation. Boomers see spending money on themselves as a way to stay healthy and happy as they age. City staff suggested it is important to survey their communities to help figure out what its boomer population wants and how the city can best spend public resources to retain aging baby boomers in the community.

8. *How appropriate is your city's current mix of community-based services for the aging baby boom generation?*

Staff from smaller towns felt that their communities have lost many services over the last few decades. Staff from larger cities felt that their communities were well situated to meet the needs of aging baby boomer residents. All city staff agreed that population size ultimately dictates the number and mix of community-based services a community can offer.

9. *How well do your city's existing facilities meet the recreational needs of an aging population? What additional facilities might be beneficial?*

Some city staff noted that their communities are working with other communities or with Carver County directly to make route connections to the regional trail system. Some communities have limited existing facilities (such as a recreational bike path to nowhere) and are a long way from being able to afford the cost of updating the facilities. Again a split was observed between larger and smaller communities; staff from larger communities stated they have the funds and the people to provide more trails and sidewalks to meet growing needs, whereas staff from smaller cities said no

such funds were available. All city staff agreed that their communities have the facilities that people are willing to pay for.

10. *Do businesses, institutions and industries in your city offer opportunities for older adults to continue working—on a paid or volunteer basis—beyond traditional retirement (ages 62–65)?*

City staff agreed that providing opportunities for baby boomers working beyond traditional retirement is going to be essential for small communities, which have smaller populations coming through the local employment pipeline. Most city staff offered anecdotal evidence of the many employment and volunteer opportunities for aging baby boomers in their communities. Many suggested people will need to work to pay the bills. City staff noted that the aging baby boomers don't think of themselves as being old, and that they are highly skilled people who would want to continuing work or volunteering in their fields of expertise. Currently city staff see lots of volunteerism among baby boomers. Many baby boomers are already partly retired and use previous skills to volunteer and work in neighborhood groups.

Service Provider Interviews

In addition to the resident focus group process, the development of the community assessment was informed by telephone interviews conducted with representatives of organizations that provide services to Carver County residents, including both services intended specifically for older adults and those intended for the general public. The service provider representatives were suggested and recruited by Katy Boone of the Carver County Office of Aging. Interview questions were specific to each service provider's field.

Alan Herrman, Carver County Transit (CART)

Alan Herrman of Carver County Transit believed that it was possible for older adults to meet their basic daily travel needs without the ability to drive, but that some Carver County communities did a better job of planning to maximize the mobility of older adults than others. Citing Waconia as an example of good planning, Herrman stated that locating senior housing in proximity to grocery stores, pharmacies, and medical facilities can have a dramatic effect on the ability of transit—especially the type of demand-responsive or dial-a-ride service that CART currently operates—to effectively serve the travel needs of older adults. Herrman also saw improved pedestrian accessibility between adjacent or nearly adjacent sites as important to improving the mobility of non-driving older adults, mentioning the problems caused by various popular destinations for older adults in Norwood being located in close proximity to each other and a new senior housing development, but on opposite sides of U.S. Highway 212, leaving basic destinations such as a grocery store in sight but out of reach for older adults uncomfortable with walking across a major trunk highway.

Mr. Herrman expected boomers to remain active, mobile, and in need of transportation very late into their lives, noting that his agency already had several centenarians as regular passengers, and at least one woman in her nineties using CART services to commute to a part-time job. In addition, Herrman believed the range of popular destinations would broaden as the

baby boomer generation grew older, and he expected that boomers would increasingly use transit to travel to volunteer work.

Herrman thought the particular form taken by boomers' volunteering behavior and community involvement represented something of an unknown in estimating future demand for the type of transit service CART provides: "[W]ill they want more service, or will they help each other out? I don't know. They might be the group that does more volunteering and helping others in their own neighborhoods."

In light of impending changes brought on by such things as the aging of the baby boomer generation, western Carver County's overall growth, and the long-term trend of rising fuel prices, Herrman saw a need for regularly scheduled, fixed-route transit service in many areas of Carver County not currently served, both to provide commuter services to and from the Twin Cities and to provide local circulator services within Carver County communities. As fixed-route service is extended to the west along such corridors as the improved U.S. Highway 212, he expected CART to increasingly evolve a symbiotic relationship with SouthWest Transit, with SouthWest operating line-haul commuter routes, and CART providing feeder services.

Going forward, Herrman saw funding as the major constraint on CART's ability to meet the changing needs of Carver County's population, due to failure of operating funds to keep with the past summer's (and likely future) increases in fuel prices, and to impending budget cuts brought on by the weak economy. As a strategy to maintain and perhaps expand services, CART has begun a process of combining services with Scott County, with the hope of reducing fixed overhead costs and adding inter-county services.

Barb Johnson, Catholic Charities Caregiver Support Program

Barb Johnson of the Catholic Charities Caregiver Support Program saw aging boomers as a population who would “[ask] for what they want rather than accepting what’s available to them.” Johnson did not see this as necessarily placing heavier demands on her program, but perhaps placing different demands on it, with boomers requiring information, training, and the ability to ask for more help if needed rather than moral support and the occasional tip to make their task easier. She saw this difference growing out of boomers being more aware of the change in their roles and relationships represented by becoming a caregiver.

Johnson believed her respite care program’s heavy reliance on long-term volunteers might prove something of a weakness as the baby boomer generation aged, not because they would not volunteer in large numbers, but rather because they would want to volunteer in a number of different areas in close succession. This shift in volunteering trends could create a need to rely more on paid staff, potentially increasing costs significantly. On the other hand, Johnson also expected retired boomers to represent “an outstanding volunteer corps—especially since both genders have been in the workforce their entire [lives].”

Johnson also expected a dramatic increase in demand for services provided in the home, saying “Meals on Wheels is not going to cut it.” She expected baby boomers to want to continue shaping their own lifestyles, and choosing their own living arrangements as they aged.

Johnson firmly believed that planning for aging boomers required developing full-service communities with quality grocery stores, pharmacies, restaurants, libraries, etc. within easy walking distance, and developing such communities as the rule rather than the exception.

Gay Matson, Community Education, Watertown-Mayer School District

Gay Matson of the Watertown-Mayer School District foresaw long-term growth for community education programs, as well as for any other programs “that still stimulate the baby boomer intellectually, socially, [or] recreationally.” In the short term, however, she reported a decline in participation for adult programming—likely attributable to the economy—in Watertown-Mayer and (as reported by her colleagues) in other school districts. She noted that families with children at home were still willing to “put money into activities for their children, but might not [be] for themselves.” In addition, Matson stated that adults did still seem willing to spend money on self-improvement type courses, such as computer classes or physical fitness programs.

Matson expected continuing education courses aimed at helping boomers remain productive members of their communities following retirement or at helping boomers make the transition into an “encore career” to grow in popularity relative to courses built more around personal interests or hobbies. In addition, she saw caregiving courses as likely to grow in importance.

Drawing a sharp distinction between boomers and older generations, Matson reported many older boomers take painting, gardening, computer, or yoga classes intended for all ages, not for older adults specifically. She expected the trend to continue as younger baby boomers approached and reached retirement, predicting increased interest in offerings like discussion groups and book clubs. Matson, herself a baby boomer, stated, “I think we’ve been influential in our work life, and after retirement we’re still going to want to be influential in our community.”

Matson saw an increasing need to look at moving some community education courses out of school buildings and into the community, possibly using spaces such as libraries or coffee shops. In searching for a space to hold a

book club or exercise class, Matson noted that “What a person needs to look at is where do baby boomers congregate.” She also stressed that the idea of “senior centers” would quickly become obsolete with the aging of the baby boomer generation, and that boomers would be much more interested in programs offered in the broader community rather than at a center removed from that community. To enable community education offerings to reach a wider range of future retired boomers, Matson stressed the need to offer classes at a wider range of times and days, as well as a need to explore online courses.

Matson echoed the saying “It takes a village to raise a child,” stating that it also “takes a village to provide for the needs of older adults.” She saw the changing demands on community education as part of a larger need to shape the community as a whole into a community for all ages.

Andy Schultz, Community Relations, Good Samaritan-Waconia

Although originally included in the interviews because of his knowledge of long-term care, Mr. Schultz painted a much more complex picture of the future of healthcare services delivered in residential facilities. Although he did expect an increase in the demand for long-term care services, he expected a more dramatic increase in demand for sub-acute, rehabilitative services. Delivered in a residential setting, these services are based on the idea that residence is temporary, and that the intent is to make the patient able to move back into his or her own home.

Schultz also said that his organization and others like it were undergoing a “culture change” intended to make their facilities, and the community formed by the people who live in them, as home-like and neighborhood-like as possible. The process aims to allow people who require the care provided by a residential facility to continue living full, enjoyable lives.

Schultz believed that aging boomers would want many more choices, in terms of both the type of care they receive and the lives they lead. He also reiterated that he saw boomers using his organization's facilities for short-term, recuperative care, with the goal of moving back into their own homes as soon as possible. He saw this shift being accompanied by an increase in demand for home-care services, with increased interaction between the two types of care, including help from Good Samaritan to determine what home-services are needed upon moving back home.

In terms of special challenges for Good Samaritan, Schultz saw the organization's national size and scope potentially slowing its ability to adapt as the baby boomer generation ages. However, he was quick to point out that he did not see institutional inertia as a major problem in Waconia, stating that his branch prided itself on innovation and "staying ahead of the curve."

Schultz saw the aging of the baby boomer generation as both a need and an opportunity to improve the services they deliver and the community their facilities create—ranging from community dining programs to the use of technology to organize and distribute needed patient information to staff members. In addition, with the anticipated and current growth of sub-acute care, he saw the opportunity to construct a new space specifically for sub-acute care, in turn allowing current long-term care rooms to be made more home-like so they offer an improved quality of life for their residents.

Looking forward, Schultz believed that education about long-term care would be critical for Carver County to change the persistent perception of long-term care facilities as places people go to die, as well as to help future long-term care residents and their families plan ahead for a low-stress transition. He also cited improved and broadened transportation options as a major need for Carver County, particularly for the county's seniors.

Paula Borer, Ridgeview Medical Center Home Health Care Services

Borer saw boomers as a much more demanding and educated clientele than previous generations, requiring a shift to more consumer-oriented healthcare services. She believed—due both to anecdotal, first-hand evidence and national studies—that boomers would strongly prefer home-care services to assisted living or other types of care delivered in a residential facility, citing more familiar and comfortable settings, faster healing times, and cost savings for patients, service providers, and insurance carriers.

Borer believed that her division’s services were well positioned for the aging of the baby boomer generation, and she anticipated significant growth in demand. However, she saw an industry-wide limited supply of certified home health aides and nurses as a potential limitation on further growth.

Looking farther ahead, Borer also expects the demand for home-care services to grow significantly in terms of hospice (end of life) care. Citing the fact that such services are covered by Medicare benefits, she saw growth in demand for home hospice care as a logical extension of boomers’ desire to be cared for in their own homes. Borer was excited at the opportunity to educate the communities her organization serves about the option for people to remain in their own homes to the very end of their lives.

In terms of the mix of services available, Borer believed Carver County was “starting from a good point” because although the number of people served would increase markedly in the coming decades, options for healthcare, housing, etc., were generally diverse and high quality. She also believed Carver County’s “main street businesses” were generally accommodating to the needs of seniors, with many offering senior shopping days and home delivery services. Borer did believe that service provision had advanced farther in the eastern portions of the county than in the western portions,

especially in terms of choices available to seniors in the more rural portions of the county.

Deb McMillan, Chaska Area Chamber of Commerce

McMillan saw a commitment to lifecycle housing as one aspect of the communities she served that made them particularly attractive to older residents. She also saw the area as safe, with little crime. On the other hand, she saw a lack of walkability in downtown Chaska as a potentially significant problem for older residents, even those living relatively short distances from many basic services.

McMillan did not expect a vast difference between baby boomers and preceding generations in terms of the mix of services and amenities they would look for in a community. In general, she expected the difference between older boomers and younger people to be greater than the differences between older boomers and preceding generations of seniors.

In terms of Chaska's strengths for adapting to an aging population, McMillan saw Chaska's commitment to accommodating people at all stages of their lives as highly important. In addition, she was encouraged by the fact that the community was already thinking about the coming changes and beginning to take actions such as forming a senior commission.

McMillan saw both challenges and opportunities in the aging of the workforce, stating that businesses will need to adapt to the needs of an older workforce by, for example, allowing flexible or part-time scheduling. She saw the chamber's role as one of educating businesses about both the need to accommodate the wishes of older workers and best practices for accommodating those wishes. McMillan believed the degree to which businesses and organizations currently offered options for older adults to work or volunteer on favorable terms varied a good deal within Chaska, but that it was certainly something "we could do better on." She also saw a

particular need for volunteer-based organizations to concentrate on drawing from the pool of talent represented by the baby boomer generation.

From an economic and commercial standpoint, McMillan expected more housing geared toward seniors to be built in Chaska. She also expected more specialized medical care facilities to appear in the coming decades.

In terms of housing, McMillan believed that Chaska offered an excellent variety of options—both for older adults and the population as a whole—with opportunities for downsizing into small-lot single-family homes or apartments, as well as assisted living and residential care options. She did see affordable housing as an issue her community would need to address as an increasing number of its residents retire and begin living on fixed incomes.

In McMillan’s view, older adults who are able to drive will have few problems with mobility, but she noted that “we really struggle with public transportation, with walkability,” and that people who are unable to drive, or who have diminished ability to drive are at a significant disadvantage in terms of basic mobility. She cited the bisection of downtown Chaska by Highway 41 as an issue for walkability.

Looking forward, McMillan hoped to see increased opportunities for workforce training for older workers. She envisioned such training as a way of allowing older workers looking to continue working after traditional retirement from their current jobs to reorient their skills for a different job, or to learn new sets of skills altogether.

Creation of the Community Survey Instrument

The community survey instrument is intended to provide communities, service providers, and others with a tool that can be used to gauge the concerns and desires of baby boomer residents in the community. Survey questions were developed based on existing resident surveys, resident and staff focus groups, and service provider interviews. The survey was refined with the help of staff at the Minnesota Center for Survey Research (MCSR) at the University of Minnesota's Center for Urban and Regional Affairs (CURA), and were further refined through discussion with interested stakeholders in the Twin Cities metropolitan area. The survey was piloted in the City of Waconia in summer 2009. The community survey is reproduced in Appendix C.

Creation of the Baby Boomer Community Readiness Assessment Instrument

The Baby Boomer Community Readiness Assessment Instrument is loosely based on a Smart Growth Audit published by the American Planning Association. The assessment instrument created for Carver County retains the basic form of the smart growth audit, with broad categories subdivided into specific questions, with space to record answers and additional comments. The assessment is broken down into eight general categories covering housing, transportation, services, urban form, health services, work, recreation, and entertainment. These categories as well as specific questions on the instrument were informed by information gathered from the focus groups and service provider interviews.

The assessment instrument asks questions about community-specific features and needs. Certain features—for example, those about housing, transportation, and urban form—relate to the physical form of the community itself. However, for other categories such as services, health services, work, recreation, and entertainment, it may be necessary to consider the questions from a multi-community perspective. Although not every community in Carver County can be expected to have all of the businesses, services, and amenities listed in the assessment instrument, neighboring communities may provide these services and amenities and thus adequately meet the need for them.

The purpose of the assessment instrument is not to produce a composite “aging baby boomer readiness score” for a given community, but rather to encourage community planners and decision makers to think about planning, development, and service issues with aging baby boomers in mind, and to provide an organized framework through which to consider such issues.

Answers to many questions in the assessment should be available from a community’s comprehensive plan, zoning ordinance, and subdivision

ordinance. In addition, Carver County's comprehensive plan (available from the county website) may be a valuable resource for a number of questions, particularly some in the transportation section. For communities with regular-route transit service, SouthWest Transit's website will provide answers to some questions. The assessment instrument also requires some analysis of existing conditions in the community. Although some of this information may be present in the community's comprehensive plan, other questions may require more effort to answer. This fact alone may indicate that a community has not sufficiently considered the future implications for the community of the aging baby boomer population. Some questions ask for the distance to various locations. These questions can be answered with readily available online mapping tools such as Google Maps or MapQuest. Other such questions may require basic geographic information systems (GIS) analysis.

Because of the range of community types in Carver County, some questions in the assessment may not apply to a given community, or may only apply to some degree. In such cases, the individual completing the assessment can qualify answers in the comments section as needed.

Like the community survey instrument, the boomer readiness assessment instrument was pilot-tested in three Carver County communities: Watertown, Victoria, and Norwood Young America. Additional feedback was provided by Diane Sprague, director of the Lifetime Home Project.

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Appendix A: Watertown and Mayer Resident Background Questionnaire

(With Anonymous, Aggregate Answers)

1. **First Name** (kept confidential)
2. **Year of birth:** Mean and median birth years of the group were 1956—showing both an even distribution of ages throughout the sample, and a fairly even breakdown between younger and older boomers, although younger boomers were slightly better represented. Exact years follow:

- 1947 (2)
- 1949
- 1950
- 1952
- 1954 (2)
- 1955
- 1956 (2)
- 1958
- 1959
- 1960 (2)
- 1962
- 1963
- 1964 (2)

3. **Primary occupation:** (One of each—answers exactly as written.)

Teacher’s aide
 Information technology
 Home Daycare Provider
 Registered nurse
 Barber
 Histology Lab Asst.
 Office manager
 Mgmt/business consultant
 Teller/Bookkeeper
 Electro-mechanical assembly/IT
 Mgmt—operations/quality
 School administrator
 MS/HS Teacher
 Office work
 Retired
 Auto Tech. Mechanic
 Self-Employed

One participant did not respond.

4. **Marital status:** All were married.

Mean	2.7
Median	3
Mode	3
Minimum	2
Maximum	4

5. **Number of children:** With the exception of one participant who misunderstood the question, answering “0 at home,” all had children; although one woman reported only having two stepchildren, they were included without distinction. (See Table 1.)

6. **How long have you lived in Watertown?** Answered showed a stark difference between Watertown and Mayer. Both Watertown groups included only long-time residents, while the Mayer group included people who had lived in town a considerable variety of lengths of time. (See Table 2.)

Table 2:

<i>Years living in-</i>	<i>Watertown</i>	<i>Mayer</i>
Mean	28	13.9
Median	27	6
Mode	27	21
Range	31	38
Minimum	14	2
Maximum	45	40

7. **How long have you lived in your current home?** Again, answered differed considerably between the two communities, even considering the differences above. In particular, all but one of the Watertown residents had moved at least

Table 3: Years Living in Current Home

	<i>Watertown</i>	<i>Mayer</i>
Mean	21.5	10.9
Median	24	6
Mode	24	21
Range	25	19
Minimum	7	2
Maximum	32	21

once within Watertown, usually fairly soon after arriving initially, while all but one of the Mayer residents had lived in the same home since arriving. This pattern might suggest that Watertown attracts more permanent residents, while Mayer tends to serve as a stepping stone up the housing ladder. (See Table 3.)

8. **Do you rent or own your current home?** With one exception (who answered, simply, “yes”) all participants owned their homes.

9. **How would you describe your home:**

- () single-family house
- () duplex
- () accessory apartment (aka mother-in-law suite)
- () apartment
- () condominium
- () other (please describe) _____

All group members lived in single-family homes.

10. **At what age do you expect to retire?**

Not surprisingly, more people expected to retire at age 65 than at any other age; 65 was also the median expected retirement age. However, a large number of participants expected to retire between ages 55 and 62—a fact reflected in the lower mean of 64 in spite of two participants who expected to retire in their 70s. Three participants did not have a clear idea when they would retire. (See Table 4.)

Table 4: Expected Retirement Age

Mean	64
Median	65
Mode	65
Minimum	55
Maximum	75

11. **What sorts of recreational and entertainment activities do you engage in on a regular basis?** See Table 5.

<i>Table 5:</i>		<i>Recreational &</i>	<i>Entertainment</i>	<i>Activities</i>
<i>Activity</i>	<i># of Responses</i>	<i>Activity</i>	<i># of Responses</i>	
Fishing	6	Safari Island Gym	1	
Golf	2	Camping	2	
Movies	5	Hiking	2	
Sporting Events	2	Snowmobiling	3	
Volleyball	2	Biking	1	
Softball	1	Boating	2	
Eating Out	2	Family Get-Togethers	3	
Basketball	1	Hunting	2	
Running	1	Sewing	1	
Reading	2	Walking	1	
Cross-Country Skiing	1	Gardening	1	
Travel	2	Horseback Riding	1	
Coaching	1	Arts	1	
Baseball	1	Theatre	1	
Fitness Center	1	Night Clubs	1	
Walking Trails	1	Volunteering	1	
League Bowling	1	EBay	1	

12. **What types of health services do you use on a regular basis?**
See Table 6

<i>Table 6: Health Services</i>	
<i>Service</i>	<i>Responses</i>
Eye Care	2
Dentist	7
Ridgeview Med. Ctr. Waconia	1
Annual Physical	3
Clinic	5
Chiropractor	1
Family Doctor	3
Fitness Center	2
Pharmacy	2
None	2
No response	3

13. **What types of community services (ex. Community education courses, trails, parks, rec. centers, etc.) do you use on a regular basis?**
See Table 7.

<i>Table 7: Community Services</i>	
<i>Service</i>	<i>Responses</i>
Parks	8
Trails	11
Teaching Community Ed	1
Ski Area	1
Community Ed.	7
Library	2
Skating Rink	1
LRT (Mall to Metrodome)	1
None	4
No response	2

14. **What is your primary means of transportation for daily activities? What, if any, other means of transportation do you normally use at least once a week?** All but three listed a private automobile as their primary means of transportation. One Watertown resident listed walking, and one other responded "scooter." One participant did not list a means of transportation, but stated that he worked from home and that his car was "not in use often anymore." Other regularly

used modes included cycling, walking and driving. One participant in Mayer made a point of noting that no viable public transportation was available in his community.

15. **Do you have any relatives living in town?** In both communities, just over half of the participants (4 out of 7 in Mayer and 6 out of 11 in Watertown) had relatives living in town.
16. **Do you have any experience providing care for friends or family who are older than you, or who have special needs? If so, what sort of care do/did you provide?** See Table 8.

<i>Type of Care</i>	<i>Responses</i>
Transportation	1
Cleaning	1
Home Care	3
Home Maintenance	2
Housework	1
Meals	1
Financial Oversight	1
Advice	1
Unspecified Care	5
First Responder	1
Registered Nurse	1
None	7

Please note that this questionnaire was not administered to a scientific, statistical sample and results therefore should not be generalized beyond the focus group participants themselves.

Appendix B: Resident Focus Group Full Discussion Guide

Between now and 2030, the number of residents in Carver County aged 65 and over will increase from 6,000 to 25,000. This will be an historic shift in the makeup of the County's population. Carver County has engaged the services of the University of Minnesota's Community Growth Options program to help plan for meeting the needs of a changing population. Our aim is to create a community survey to identify that changing population's needs and expectations, as well as to help determine how existing community systems, services and amenities measure up.

To guide the development of this community survey, we are conducting a series of focus groups with elected officials, government staff, service providers and community residents. None of the answers you provide will be shared with anyone in a way that makes the information personally identifiable, and none of your answers will be made available to anyone except the University of Minnesota team and county staff members creating the assessment tools.

Before we begin, I'd like to set a few ground rules to facilitate discussion and ensure everyone is treated with respect.

- My (our) role as moderator(s) is to keep discussion moving and make sure these ground rules are followed.
- The purpose of the focus group is to have a group discussion about the questions we'll be asking you. We want to know your individual response to the questions, but we also want to know what you think about what others in the group have to say.
- Only one person has the floor at a time. Please do not interrupt someone who's speaking, or carry on side conversations with others at the table.
- Be respectful of other participants. You can certainly disagree with them, but please do so civilly.
- Our goal is to hear from everyone at the table. However, if you do not feel comfortable answering a particular question, you don't have to.
- Remember there are no right or wrong answers to the questions. We are simply interested in what you think. Even negative comments are helpful for us to learn about the issues we'll be discussing.
- If you need to take a break, please let me (us) know. We will take all breaks as a group. We ask that you NOT discuss the issues we're talking about with others until we return from the break.
- All comments you make are confidential. Only summarized information will be shared with or communicated to others.
- Please say your FIRST name each time before you speak. We are tape recording the session, and it's difficult to tell who is speaking without this identification.

Does anyone have any questions before we begin?

1. How long have you lived in this community? What initially brought you here?
Follow-Up: What has kept you here?
2. 10 to 15 years from now do you see yourself still living in this community?
Follow-Up: What changes would you make to the community? What type of community would you rather live in?
3. Ten years from now, do you see yourself still living in the same place?
Follow-Up: What physical changes would you make to your home? What type of home would you rather live in?
- 4a. What does the phrase *maintaining your independence* mean to you?
- 4b. How important is it to you to maintain your independence in the future?
5. In 10 to 15 years, what types of transportation options would you like to be available in your community?
6. In the future, do you think your standard of living will increase, decrease or remain about the same?
7. Do you envision yourself continuing to work—for pay or not—beyond traditional retirement?
Follow-Up: What type of work would you like to do? How often would you like to work? Where might you volunteer?
8. What types of community-based resources would you like the community to improve on or provide to you in the coming 10 to 15 years?
Example: Community education courses, trails, parks, rec. centers, etc.
9. What type of consumer-based services would you like the community to improve on or provide to you in the same period of time?
Example: Grocery delivery, bank services, healthcare, yard services, etc.
- 10a. What does the phrase *involved in the life of the community* mean to you?
- 10b. How important is it to you to be involved in the life of your community in the next 10 to 15 years?
11. Ten years from now, what sorts or recreational and entertainment activities do you see yourself engaging in?
Follow-Up: Are these available to you now?
12. Think over the things we've discussed today; what is one priority you would like the city and county to be aware of as they prepare for a changing population.

Appendix C

Carver County Community Survey

Please circle the number or letter that corresponds to the answer closest to your opinion, or write in the information requested in the space provided. All individual responses will remain confidential.

The goal of this questionnaire is to measure residents' feelings about their future needs and preferences when they reach retirement age. Providing this information will help Carver County and your local community decide on the best ways to meet the needs of residents.

Q1. How many years have you lived in Carver County?

_____ Years

Q2. How long have you lived in your current residence?

_____ Years

Q3. Do you own or rent your residence? (circle one)

1 Rent

2 Own

Q4. Will you be living in Carver County in the next 15 years? (circle corresponding number)

1 Yes

2 No

Q5. Will you be living in your current home in the next 15 years? (circle corresponding number)

1 Yes

2 No

If Yes →

Q5a. How likely is it that you will need to physically modify your home for safety, mobility, or similar reasons in the next 15 years?

1 Very Likely

2 Somewhat Likely

3 Not Very Likely

4 Not at all Likely

5 Don't know

Q5b. If you likely will modify your home, how would you modify it?

If No →

Q5c. In 15 years, do you expect to own or rent your place of residence?

- 1 Own
- 2 Rent

Q5d. What type of housing would you most likely move to in the next 15 years? (circle one)

- a. A single-family home
- b. A unit in a duplex
- c. A unit in a triplex or quad structure
- d. A unit in a townhouse-style building (common exterior features and walls, individual entrances)
- e. A unit in an apartment-style building (common entrance, units on corridor halls)
- f. Assisted living facility
- g. Nursing home facility
- h. Other _____

Q5e. Would you most likely move to a single-level or multi-level home in the next 15 years? (circle one)

- a. Single-level
- b. Multi-level

Q5f. In 15 years, will it be important for you to have a home that has been designed for easy accessibility, such as a handicapped-accessible home or a home with universal design features?

- a. Yes
- b. No

Q5g. What type of neighborhood would you most likely move to in the next 15 years? (circle one)

- a. Single-family residential-only on larger lots
- b. Single-family residential-only on smaller lots
- c. Mixed single and multi-family residential
- d. Mixed residential and neighborhood commercial
- e. Other _____

Q5h. What type of community would you most likely move to in the next 15 years? (circle one)

- a. Current community
- b. Another community in Carver County
- c. Another community in the Twin Cities metro area
- d. Another community in Minnesota outside the Twin Cities metro
- e. A community in another state
- f. Other _____

Q6. In a typical week, which modes of transportation do you use? (circle all that apply)

- a. Single-Occupancy vehicle
- b. Motorcycle or motorbike
- c. Carpool as driver
- d. Carpool as passenger
- e. Public bus transit
- f. Dial-a-ride service
- g. Taxi
- h. Rail transit
- i. Bicycle
- j. Foot

Q7. In a typical week, which mode of transportation do you use most often? (circle one)

- a. Single-Occupancy vehicle
- b. Motorcycle or motor bike
- c. Carpool as driver
- d. Carpool as passenger
- e. Public bus transit
- f. Dial-a-ride service
- g. Taxi
- h. Rail transit
- i. Bicycle
- j. Foot

Q8. If you were no longer able to drive or were without a vehicle, which of the following modes of transportation would you prefer to use? (circle all that apply)

- a. Carpool as passenger
- b. Public bus transit
- c. Dial-a-ride service
- d. Taxi
- e. Rail transit
- f. Bicycle
- g. Foot
- h. Other _____

Q9. Of the modes listed in question 8, if you were unable to drive or were without a vehicle, which of the following modes are you most likely to use? (circle one)

- 1 Carpool as passenger
- 2 Public bus transit
- 3 Dial-a-ride service
- 4 Taxi
- 5 Rail transit
- 6 Bicycle
- 7 Foot
- 8 Other _____

Q10. In a typical week, which of the locations below do you travel to? (circle all that apply)

- a. Destinations within your city or township
- b. Destinations in other Carver County communities
- c. Destinations in the Twin Cities metro outside of Carver County
- d. Minneapolis–St. Paul Airport
- e. Downtown Minneapolis
- f. Downtown St. Paul
- g. Greater Minnesota (outside the Twin Cities metro area)
- h. Out of the state
- i. Other _____

Q11. In a typical week, which of the following locations do you travel to most often? (circle one)

- a. Destinations within your city or township
- b. Destinations in other Carver County communities
- c. Destinations in the Twin Cities metro outside of Carver County
- d. Minneapolis–St. Paul Airport
- e. Downtown Minneapolis
- f. Downtown St. Paul
- g. Greater Minnesota (outside the Twin Cities metro area)
- h. Out of the state
- i. Other _____

Q12. In 15 years, do you expect to still travel to this location most often?

- 1. Yes
- 2. No

Q13. Do you currently work?

- 1. Yes
- 2. No

If Yes →

Q13a. In what city do you currently work? _____
--

Q14. Do you expect to work in a paid position past the standard retirement age of 65?

- 1. Yes
- 2. No

If Yes →

Q14a. Where do you see yourself working for pay past retirement?

- a. Current job
- b. Different job

Q XXX. If you said a different job, what would that job be?

Q14b. How many hours a week do you see yourself working?

- a. Less than 10 hours a week
- b. 10–20 hours a week
- c. 21–30 hours a week
- d. 31–40 hours a week
- e. More than 40 hours a week

Q15. Do you expect to work in an unpaid position past the standard retirement age of 65?

- a. Yes
- b. No

If Yes →

Q15b. Where do you see yourself working in an unpaid position past retirement?

- c. Current job
- d. Different job

Q15c. How many hours a week do you see yourself working?

- f. Less than 10 hours a week
- g. 10–20 hours a week
- h. 21–30 hours a week
- i. 31–40 hours a week
- j. More than 40 hours a week

Q 16. Regardless of whether or not you continue to work past traditional retirement age, what do you envision spending your leisure time doing? (circle all that apply)

- | | |
|----------------------------------|--|
| a. Traveling | h. Walking |
| b. Hobbies | i. Biking |
| c. Spending time with family | j. Volunteering |
| d. Watching TV | k. Community service projects |
| e. Relaxing | l. Attending cultural or sporting events |
| f. Yard work or household chores | m. Serving in public office |
| g. Exercising | n. Other _____ |

Q17. Do you have a financial retirement plan such as a 401(k), IRA, or pension?

1. Yes
2. No

If yes →

Q17a. Do you think your financial retirement plan will adequately provide for your living needs, or will you require other income to live comfortably?

- a. Retirement plan will be adequate
- b. Will require other income

Q18. Thinking about your current work, what is important to you about your job?

	<u>Very Important</u>	<u>Somewhat Important</u>	<u>Not Very Important</u>	<u>Not Important at All</u>	<u>Don't</u>
<u>Know</u>					
Income	1	2	3	4	5
Health benefits	1	2	3	4	5
Sense of fulfillment	1	2	3	4	5
Having something to do	1	2	3	4	5
Interacting socially with others	1	2	3	4	5

Q19. Of the items listed in the previous question, which is the most important to you about your current job? (circle one)

- a. Income
- b. Health benefits
- c. Sense of fulfillment
- d. Having something to do
- e. Interacting socially with others

Q20. Thinking about your work 15 years from now, what will be important to you in your job?

	<u>Very Important</u>	<u>Somewhat Important</u>	<u>Not Very Important</u>	<u>Not Important at All</u>	<u>Don't Know</u>
Income	1	2	3	4	5
Health benefits	1	2	3	4	5
Sense of fulfillment	1	2	3	4	5
Having something to do	1	2	3	4	5
Interacting socially with others	1	2	3	4	5

Q21. Of the items listed in the previous question, which will be the most important to you about your future job? (circle one)

- a. Income
- b. Health benefits
- c. Sense of fulfillment
- d. Having something to do
- e. Interacting socially with others

Q22. Which of the following recreational facilities are important to you (circle all that apply)?

- a. Parks
- b. Pedestrian trails
- c. Bike trails
- d. Gym or indoor recreational facility
- e. Swimming pool
- f. Public-access lake or river
- g. Golf course
- h. Bowling alley
- i. Tennis court
- j. Baseball/softball diamond
- k. Sports field (soccer, football, etc.)
- l. Cross-country skiing or snowshoeing trails
- m. Snowmobiling trails
- n. Ice skating rink
- o. Other _____

Q23. Which of the following recreational facilities will be important to you in 15 years?
(circle all that apply)

- | | |
|---|--|
| a. Parks | i. Tennis court |
| b. Pedestrian trails | j. Baseball/softball diamond |
| c. Bike trails | k. Sports field (soccer, football,
etc.) |
| d. Gym or indoor recreational
facility | l. Cross-country skiing or
snowshoeing trails |
| e. Swimming pool | m. Snowmobiling trails |
| f. Public access lake or river | n. Ice skating rink |
| g. Golf course | o. Other _____ |
| h. Bowling alley | |

Q24. What are your current favorite forms of exercise? (circle three)

- | | |
|--------------------|--|
| a. None | l. Volleyball |
| b. Walking | m. Weight training |
| c. Biking | n. Racquetball |
| d. Running/jogging | o. Canoeing or boating |
| e. Hiking | p. Yoga |
| f. Tennis | q. Thai-Chi |
| g. Softball | r. Aerobic workouts |
| h. Basketball | s. Rollerskating or rollerblading |
| i. Soccer | t. Cross-country skiing, ice skating,
or snow shoeing |
| j. Football | u. Other _____ |
| k. Swimming | |

Q25. What will be your most likely favorite forms of exercise in 15 years? (circle three)

- | | |
|--------------------|--|
| a. None | l. Volleyball |
| b. Walking | m. Weight training |
| c. Biking | n. Racquetball |
| d. Running/jogging | o. Canoeing or boating |
| e. Hiking | p. Yoga |
| f. Tennis | q. Thai-Chi |
| g. Softball | r. Aerobic workouts |
| h. Basketball | s. Rollerskating or rollerblading |
| i. Soccer | t. Cross-country skiing, ice skating,
or snow shoeing |
| j. Football | u. Other _____ |
| k. Swimming | |

Q26. Which of the following business establishments or services would you like to have available in 15 years within 1/2 mile walking distance from your residence? (circle all that apply)

- a. Grocery store
- b. Convenience store
- c. Gas station
- d. Pharmacy
- e. Bank
- f. Post office
- g. Law office
- h. Doctor's office
- i. Dentist's office
- j. Barber/hairdresser
- k. Church
- l. Coffee shop
- m. Bakery
- n. Bar/tavern
- o. Fast-food restaurant
- p. Family-style restaurant
- q. Hardware store
- r. Laundry/dry cleaner
- s. Clothing store
- t. Library
- u. Liquor store
- v. Community center

Q27. Which of the following entertainment options would you like to have available to you in 15 years within 1 mile of your home? (circle all that apply)

- a. Movie theater
- b. Live theater
- c. Live music venue
- d. Video rental store
- e. Outdoor bandstand or amphitheatre
- f. Sporting event arena
- g. Museum or arts center
- h. Other _____

Q28. Which of the following do you consider important in planning for your community's growth over the next 15 years? (circle all that apply)

- a. Maintaining community character
- b. Attracting or retaining residents
- c. Promoting business expansion
- d. Strengthening or maintaining "Main Street businesses"
- e. Expanding retail options
- f. Improving access to important destinations
- g. Increasing transportation/transit options
- h. Providing affordable housing
- i. Improving government services to residents
- j. Protecting sensitive natural environments
- k. Creating jobs
- l. Increasing diversity of housing types
- m. Increasing parks & trails
- n. Increasing volunteer opportunities
- o. Other _____

Q29. Which of the following do you consider most important in planning for your community's growth over the next 15 years? (circle one)

- a. Maintaining community character
- b. Attracting or retaining residents
- c. Promoting business expansion
- d. Strengthening or maintaining "Main Street businesses"
- e. Expanding retail options
- f. Improving access to important destinations
- g. Increasing transportation/transit options
- h. Providing affordable housing
- i. Improving government services to residents
- j. Protecting sensitive natural environments
- k. Creating jobs
- l. Increasing diversity of housing types
- m. Increasing parks & trails
- n. Increasing volunteer opportunities
- o. Other _____

Q30. Which of the following do you think would help you remain involved in your community in the next 15 years? (circle all that apply)

- a. Community festivals or events
- b. Revitalization of the community's downtown
- c. Development or revitalization of connected neighborhoods that encourage walking and interaction between neighbors
- d. Improved or broadened transportation options for people who cannot or choose not to drive
- e. Expanded volunteer opportunities
- f. Increased recreational opportunities
- g. Opportunities for involvement in civic affairs
- h. Other _____

Q31. What is your marital status?

- a. Married
- b. Divorced
- c. Single
- d. Widowed
- e. Other _____

Q32. How many children do you have?

Q33. What is your year of birth?

19_____

Thank you for taking the time to complete this survey

Appendix D: Government Staff Background Questionnaire—Aggregated Results

1. First Name (Kept Confidential)
2. **Year of birth:** Mean and Median birth years of the group were both 1955. Exact years follow:
 - 1947
 - 1948 (1)
 - 1949 (1)
 - 1950 (1)
 - 1952
 - 1953 (1)
 - 1954
 - 1955
 - 1956
 - 1958 (2)
 - 1959
 - 1960 (1)
 - 1962
 - 1963
 - 1964
 - 1965 (1)
3. **Primary occupation:** (One of each—answers exactly as written.)
 - (4) City Administrator
 - Deputy Clerk-Treasurer
 - City Council
 - Planning Director
 - Community Development Director

One participant did not respond.
4. **How long have you held this position?**
Mean = 9.6 years | Median = 9.5 years
5. **Percentage of residents aged 65 or older?**
Mean = 28% | Median = 25%
6. **Briefly describe the types of services your city currently provides to residents aged 65 or older**
This answer ranged from “nothing at this time” to “senior citizens club, C.A.R.T busing, free lunch once a month from grocery store, trails, commission on aging, senior housing, assisted living facility, subsidized senior housing, community center, medical center, housing alternatives, specialty clinics, volunteer opportunities, senior dining, meals on wheels, and southwest transit.

7. **Do you live in Carver County?**

Yes = 5 | No = 3

8. **Do you have any experience providing care for older friends of family?
If so, what sort of care do/did you provide?**

Yes = 5 | No = 3

City Staff's personal experiences working with older friends or family ranged from working as a direct care staff at a geriatric unit to planning assisted living facility to delivering groceries, cleaning homes, and financial assistance.

Please note that this questionnaire was not administered to a scientific, statistical sample. Therefore, results should not be generalized beyond the focus group participants themselves.

Appendix E: Government Staff Focus Group Discussion Guide

Background Questions

1. First Name:
2. Year of birth:
3. Position/Job Title
4. How long have you held this position?
- 4a. Roughly what percentage of your residents are aged 65 or older?
5. Briefly describe the types of services your city currently provides to residents aged 65 or older.
6. Briefly describe types of services your city expects to provide in the next 10 to 15 years for residents 65 or older.
7. Do you live in Carver County? If so for how long?
8. Do you have any experience providing care for older friends or family? If so, what sort of care do/did you provide?

In the next few minutes, please reflect on what sorts of amenities and services make your community an accommodating (or not) place for an aging population. Are a variety of recreational activities offered? Are healthcare services and facilities accessible and comprehensive? What types of social services are available to residents? What is the quality-of-life standard you hope to provide in your community?

Focus Group Questions

Between now and 2030, the number of residents in Carver County aged 65 and over will increase from 6,000 to 25,000. This growing group is called the “baby boomers” and they currently range from age 44-62 (born 1946-1964). This population growth will be an historic shift in the makeup of the County’s population. The Carver County Office of Aging has engaged the services of the University of Minnesota’s Community Growth Options program to help plan for meeting the needs of a changing population. Our aim is to create a community survey to identify that changing population’s needs and expectations, to help determine how existing community systems, services and amenities measure up.

To guide the development of this community survey, we are conducting a series of focus groups with elected officials, government staff, service providers and community residents. None of the answers you provide will be shared with anyone in a way that makes the information personally identifiable, and none of your answers will be made available to anyone except the University of Minnesota team and county staff members creating the assessment tools.

Before we begin, I’d like to set a few ground rules to facilitate discussion and ensure everyone is treated with respect.

- My (our) role as moderator(s) is to keep discussion moving and make sure these ground rules are followed.
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- Only one person has the floor at a time. Please do not interrupt someone who’s speaking, or carry on side conversations with others at the table.
- Be respectful of other participants. You can certainly disagree with them, but please do so civilly.
- Our goal is to hear from everyone at the table. However, if you do not feel comfortable answering a particular question, you don’t have to.
- Remember there are no right or wrong answers to the questions. We are simply interested in what you think. Even negative comments are helpful for us to learn about the issues we’ll be discussing.
- If you need to take a break, please let me (us) know. We will take all breaks as a group. We ask that you NOT discuss the issues we’re talking about with others until we return from the break.
- All comments you make are confidential. Only summarized information will be shared with or communicated to others.
- Please say your FIRST name each time before you speak. We are tape recording the session, and it’s difficult to tell who is speaking without this identification.

1. [Everyone] How long have you been working in Carver County?
→ Follow-Up: What has kept you there?
2. What characteristics of your (working) city do you think make it attractive or unattractive to older residents?
3. Do you think the needs of aging baby boomers might differ from the needs of earlier generations of older people?
→ Go through the list if needed

*****We are now going to do an oral SWOT analysis to identify strengths, weaknesses, opportunities and threats to your community as this demographic shift occurs.**

- 4a. What do you see as your city's main **strengths** in adapting to an aging population during the next 20 years?
- 4b. What do you see as your city's main **weaknesses** in adapting to an aging population during the next 20 years?
- 4c. What specific **opportunities** do you see for your city to benefit from the demographic shift to an older population?
- 4d. What specific **threats** or challenges do you see for your city as it adapts to an aging population?
5. How suitable is your city's existing and planned **housing** stock for an aging population?

→ What constitutes suitable or not suitable for the coming "baby boomer generation? How is it different?

→ *If suitable:* Do you expect many dwellings to require modifications as their inhabitants age?

→ *If not suitable:* What other types of housing are needed? Does the current zoning code/comp plan encourage or inhibit their construction?

→ *If not sure:* What do you think are the characteristics of housing adapted to the needs of an aging population?
6. What do you think of your city's existing **transportation** and mobility options ability to meet the needs of the baby boom generation as its

members grow older? What steps could be taken to improve the mobility of older adults in your city?

6a→ What can your city do to decrease the need for transit?

7. What effects do you think an aging population will have on your city's economic and commercial life?
- 8a. How appropriate is your city's current mix of community-based services (community education courses, trails, parks, event facilities, libraries, volunteerism) for the aging baby boom generation?
Follow-up→How is this generation's approach to retirement different from previous generations?
 - What, if any, changes do you envision in the types of services that will be needed?
 - What, if any, changes do you envision in the delivery methods for these services?
- 8b. How appropriate is your city's current mix of consumer-based services (grocery store/shopping, bank services, healthcare, yard work, pharmacy, etc.) for the aging baby boom generation?
 - What, if any, changes do you envision in the types of services that will be needed?
 - What, if any, changes do you envision in the delivery methods for these services?
9. How well do your city's existing facilities meet the recreational needs of an aging population? What additional facilities might be beneficial? (In the Watertown focus group ¾ths of those surveyed biked and commented there are few 'destination biking' trails→does your city see this as need that should be addressed?)
10. Do businesses, institutions and industries in your city offer opportunities for older adults to continue working—on a paid or volunteer basis—beyond traditional retirement (62-65)?
- 10a. Follow-up→ Do you see a difference in baby boomer volunteer's needs?
11. Thinking over the things we've discussed today: what is one priority for you or your city in light of the changing demographics of the community you serve?

Appendix F: Baby Boomer Community Readiness Assessment

Housing

QUESTION	ANSWER	COMMENTS
General Housing		
How many single family units are located in the community?		
How many multi-family units are located in the community?		
What percentage of single-family units are rental units vs. owner-occupied units?	%	
What percentage of multifamily units are rental units vs. owner-occupied units?	%	
How many single-family units are planned for the community in the next 10–15 years?		
How many multifamily units are planned for the community in the next 10–15 years?		
Where in your community does the current senior population (aged 65+) typically live?		
Roughly what percentage of the current senior population resides in units that are located in age-segregated properties or subdivisions?	%	
What proportion of the community's existing housing is one-story (include ground-floor units in multistory apartments)?	%	
What proportion of the community's planned housing incorporates basic universal design features ³ ?	%	
Does your community's zoning ordinance permit, encourage, or require universal design features?		
Does your community's zoning ordinance allow accessory dwelling units as a permitted use?		

³ Universal design features include no-step entry to the home and to main rooms, one-story living; wide doorways (32–36 inches) to allow wheelchairs to pass through; wide hallways (36–42 inches); extra floor space to allow those in wheelchairs or walkers to turn around and maneuver easily (<http://www.design.ncsu.edu/cud/>).

What percentage of the community's existing and planned housing units lie within ½-mile walk of the downtown or neighborhood commercial districts that provide for daily goods and services needs?	%	
Has a housing needs assessment been conducted for the community?		
Did the housing needs assessment specifically consider the needs of an aging population based on current demographic projections for your community?		
Does the community meet current needs for multi-family and single-family attached housing based on the needs assessment?		
Housing Affordability		
What percentage of rental housing units within 1/2 mile of downtown or neighborhood commercial districts are affordable ⁴ at 60% of community median income? At 80% of community median income?	%	
What are the current Metropolitan Council targets for affordable rental housing in your community?		
Does the community currently meet Metropolitan Council targets for affordable rental housing?		
What percentage of rental units in the community are handicapped accessible?	%	
What percentage of handicapped-accessible units are affordable at 60% of community median income? At 80% of community median income?	%	
What percentage of owner-occupied housing units within 1/2 mile of downtown or neighborhood commercial districts are affordable at 60% of community median income? At 80% of community median income?	%	
What are the current Metropolitan Council targets for affordable owner-occupied housing in your community?		

⁴ A unit is considered affordable if it is priced at or below 30% of gross income of a household earning 60% of the Twin Cities median family income (or \$46,200 in 2005). The 60% income threshold is determined by the U.S. Department of Housing and Urban Development (HUD).

Does the community currently meet Metropolitan Council targets for affordable owner-occupied housing?		
What are the future Metropolitan Council targets for affordable owner-occupied housing for 2030?		
What are the future Metropolitan Council targets for affordable rental housing for 2030?		
Does the community's comprehensive plan address and plan for the 2030 Metropolitan council affordable housing targets?		
Supportive Housing		
Does the comprehensive plan consider specific housing needs of different demographic groups, such as older adults? If so, how?		
How many unrelated individuals are permitted to share a single-family dwelling unit in the community? ⁵		
Does the current zoning (or other) ordinance limit the number of unrelated individuals who may share a rental unit? ⁶		
Does the current zoning ordinance allow single-family homes to be converted into multi-unit dwellings?		
Are accessory dwelling units (also known as mother-in-law suites) permitted in areas zoned for single-family residential? ⁷ If so, are such uses permitted by right?		

⁵ *Allowing unrelated individuals to share single-family homes can make aging in place easier.*

⁶ *Limiting or prohibiting unrelated individuals from sharing a rental unit may inadvertently prevent a live-in attendant.*

⁷ *Many baby boomers currently live in single-family homes sized for a larger family than an empty-nest couple. Oversized housing can be a significant financial strain for people living on fixed incomes. Accessory dwelling units (ADU) can reduce maintenance by allowing homeowners to downsize without moving, and offer a source of supplemental income if they are able to rent out the remaining space in their dwelling. In addition, ADUs can help create higher residential densities without changing the character of existing, single-family residential neighborhoods.*

Do current ordinances allow for reasonable adaptations for such things as room additions, lighting, placement of wheelchair ramps, or other alterations that might allow residents to age in place? ⁸		
Are assisted-living units or facilities available in your community? ⁹		
If so, what percentage of the community's housing units do assisted living units account for?	%	
Is assisted living housing in or adjacent to a downtown or neighborhood commercial district that provides for daily goods and services needs?		
If not, is fixed-route or on-demand transit available to and from destinations that provide for daily goods and services needs?		
Does the community's comprehensive plan provide for assisted living needs projected for 2030 by the Metropolitan Council?		

⁸ Research indicates that baby boomers prefer to "age in place." Allowing reasonable adaptations such as wheelchair access ramps, low-maintenance landscaping instead of maintained lawns, or improved exterior lighting can help to facilitate aging in place.

⁹ Assisted living facilities refer to developments where seniors own their housing unit and have available to them a menu of support services that are provided either for a standard monthly charge or on a per-service basis.

Transportation

QUESTION	ANSWER	COMMENTS
Regular-Route Bus Service		
Is regular-route bus service available in your community? ¹⁰		
If so, how many routes serve the community?		
What percentage of households are within ¼ mile of a regular-route bus stop?	%	
Do existing routes provide access to locations in your community where jobs, goods, services, and recreational and entertainment opportunities are located?		
Express-Route Bus Service		
Is express-route bus service available in your community?		
If so, how many routes serve the community?		
To what destinations is express-route bus service available? Do these destinations include employment centers, service/retail centers, and recreational and entertainment destinations?		
What percentage of households are within ¼ mile of an express-route bus stop?	%	
Car Pools and Van Pools		
Does your community facilitate car pools and van pools?		
If not, do agencies or community groups offer these services?		
Does the community assist agencies or community groups in developing such services?		
Park and Ride Facilities		
Is there a park-and-ride facility located in your community?		
If not, how far is the nearest park-and-ride from residential zones in your community?	miles	

¹⁰ Though it does not provide a door-to-door ride, fixed-route service requires no advance reservation, offering much more flexibility and spontaneity than demand-responsive or dial-a-ride service.

Demand-Responsive Vehicle Service		
Is demand-responsive vehicle service in your community restricted by age or disability?		
How far in advance must a reservation be made?		
How long must the average user remain at their destination before return service is available?	<i>hours</i>	
Future Transit Service		
Will budget shortfalls limit the number of transit routes or frequency of service to your community in the near future?		
Do local, county or Metropolitan Council plans call for the future provision or expansion of transit service in your community?		
General Accessibility		
Does the community have any residential or mixed residential and commercial neighborhoods with fully interconnected, gridiron streets? ¹¹		
If so, what percentage of residential units are located in such neighborhoods?	<i>%</i>	
What percentage of businesses are located in such neighborhoods?	<i>%</i>	
Automobile Accessibility		
Do regulations for new commercial and residential developments encourage the extension of the traditional street grid pattern, or the creation of one if none is present?		
Do regulations for new commercial and residential developments encourage or require connections to existing connector streets?		
Do regulations for new commercial and residential developments encourage or require connections with all adjacent local streets?		
Do regulations for new development prohibit or discourage the construction of cul-de-sacs in residential neighborhoods?		

¹¹ *Grid-pattern streets offer direct walking and cycling routes to destinations in all directions. In addition, they distribute motor traffic over a wider variety of streets, reducing the need for pedestrians—especially older pedestrians—to cross wide, high-speed "through streets."*

Pedestrian Accessibility		
Do development regulations require or encourage the construction of sidewalks or pedestrian trails in new developments?		
Do development regulations require or encourage the connection of sidewalks or trails in new developments to existing sidewalk or trail systems in the community?		
Does the community require that existing sidewalks or trails to be retrofitted with curb cuts at street corners? ¹²		
Bicycle Accessibility		
How many miles of designated on-street or off-street bike paths currently exist in the community?	miles	
How many miles of designated on-street or off-street bike paths are planned for the community in the next 10–15 years?	miles	
Do development regulations require or encourage the construction of bike paths in new developments?		
Do development regulations require or encourage connection of bike paths in new developments to existing bike paths in the community?		
Are bike paths regularly plowed and maintained during the winter?		
Parking Requirements		
Are the community's parking requirements designed to encourage shared parking, on-street parking, or other methods for reducing off-street parking? ¹³		

¹² Curb cuts at street corners are required by the Americans with Disabilities Act for all new developments, but many communities have older infrastructure that was installed before passage of the act. Curb cuts at street corners allow for better accessibility for wheelchair users, pedestrians, and cyclists.

¹³ Excessive off-street parking requirements can increase pedestrian distances for older adults (and others), reduce safety by encouraging frequent curb-cuts, and create highly inhospitable pedestrian environments between streets and pedestrian destinations.

Services

QUESTION	ANSWER	COMMENTS
Home Services		
Are services such as basic home maintenance, yard care, leaf/snow removal, etc., readily available in the community? ¹⁴		
If so, are these services reasonably affordable for residents living on fixed incomes?		
Do any programs exist in your community to list or recommend reputable and reliable providers of such services?		
Do any programs exist in your community to provide such services to older adults at reduced cost or to assist with costs?		
Telecommunications		
Do residential neighborhoods in your community have access to high-speed internet service?		
Are there locations in your community, such as a library or community center, where residents have free access to high-speed internet?		
Does your community have a public access television station?		
If so, does the station broadcast programming geared specifically toward older residents?		
Does the station regularly broadcast local city or town council meetings?		
Retail, Service, and Other Establishments		
Which of the following are located in your community:		
Full-service grocery store		
Convenience store		
Gas station		
Pharmacy		
Hairdresser or barber		
Bank		
Post office		
Clothing store		
Hardware store		

¹⁴ Research indicates that many baby boomers desire to age in their existing homes. Aging in a single-family home is much easier if help with basic maintenance tasks is readily available at a reasonable cost.

Doctor's office or medical clinic		
Dentist's office		
Public library		
Church		
Liquor store or tavern		
Bakery		
Drycleaner or laundromat		
Coffee shop		
Fast-food restaurant		
Family-style restaurant		
Community center		
Do any of these establishments provide free home delivery in your community?		
For those establishments not located in your community, how far (in miles) are these services located from the center of your community?		
Full-service grocery store		
Convenience store		
Gas station		
Pharmacy		
Hairdresser or barber		
Bank		
Post office		
Clothing store		
Hardware store		
Doctor's office or medical clinic		
Dentist's office		
Public library		
Church		
Liquor store or tavern		
Bakery		
Drycleaner or laundromat		
Coffee shop		
Fast-food restaurant		
Family-style restaurant		
Community center		

Does your community have an economic development plan to attract basic retail and service establishments that are currently absent?		
<i>Education and Retirement Planning</i>		
Are continuing education programs available in your community?		
Does a local bank (or other institution) in your community offer informational programs on retirement finance pre-planning?		

Urban Form

QUESTION	ANSWER	COMMENTS
Does the community's comprehensive plan encourage mixed-use commercial and residential development?		
Does the community have traditional neighborhood commercial or main-street business districts? ¹⁵		
Are basic service and retail businesses located in close proximity to major residential areas?		
If so, are these areas easily accessible to residential areas by walking or biking?		
Do any community plans or development regulations encourage residential developments to locate on the same side of major roads as basic services?		
Are there clearly marked pedestrian crosswalks in residential areas?		
Are there clearly marked pedestrian crosswalks near services and retail establishments in commercial districts?		
Does the community require or encourage use of traffic calming measures in commercial and residential areas? ¹⁶		
Are all (or nearly all) developed areas within the community contiguous? ¹⁷		
Does the comprehensive plan call for planned phasing of growth in specific areas?		
Does the comprehensive plan direct growth to areas contiguous to existing development?		

¹⁵ A compact, vibrant, easily walkable main street or neighborhood commercial district can be an important amenity for older adults because they tend to concentrate many retail and service businesses within easy walking distance of each other.

¹⁶ Traffic calming measures are aimed at reducing vehicle speeds, discouraging cut-through traffic, and improving traffic safety. Typically this involves physical measures such as speed displays, chokers, chicanes, traffic circles, speed humps, or raised crosswalks.

¹⁷ Contiguous development reduces distances within a community, and makes walking, biking, and public transportation access much more feasible, significantly reducing the degree of isolation experienced by those with mild to moderate mobility limitations.

Do any community plans encourage or require placement of parks or recreational areas such that all residential areas in the community are located within one-half mile of such a facility?		
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Health Services

QUESTION	ANSWER	COMMENTS
Are basic, non-emergency medical services available in the community? ¹⁸		
If so, are all major insurance plans accepted by at least one provider?		
Are medical services located near and accessible to residential areas in the community?		
How far (in miles) is each of the following located from the center of your community:		
Hospital	miles	
Dentist	miles	
Eye-care facility	miles	
Medical clinic that provides access to common specialists	miles	
Urgent care clinic	miles	
Are any home healthcare services available to residents in your community?		
If so, are these services reasonably affordable for residents living on fixed incomes?		
Are any free or low-cost medical assessment programs available to residents in your community? ¹⁹		
What is the average emergency medical service (EMS) response time in your community?		

¹⁸ Although research suggests that baby boomers are generally healthier than previous generations, easy access to basic medical services will be critical for aging boomers who desire to age in place.

¹⁹ Free assessments are generally provided in public spaces such as pharmacies or grocery stores, and may include such things as blood pressure testing, cholesterol screenings, flu shots, heart screenings, and diabetes screenings.

Employment and Volunteer Opportunities

QUESTION	ANSWER	COMMENTS
What growth in employment does the Metropolitan Council project for your community by 2030?	%	
If they are available, what growth is projected for the 18–65 and 65+ populations in your community by 2030?	%	
Does the community have a current economic development plan?		
If so, does the plan specifically consider the future employment needs of baby boomers past traditional retirement age?		
Is a wide variety of part-time and flexibly-scheduled employment currently available in your community? ²⁰		
Does the part-time and flexibly-scheduled employment currently available in your community offer opportunities for baby-boomers to use their skills, education, and experience in rewarding ways?		
What opportunities for volunteer work are currently available in the community?		
Are there opportunities for baby boomers to volunteer in ways that use their skills, education, and experience in rewarding ways?		
Does the community allow or encourage home-based businesses? ²¹		

²⁰ Research suggests that many baby boomers plan to continue working for a considerable period of time after traditional retirement age. However, many, if not most, would prefer to work part-time, with a more flexible schedule than before. Because research also shows that the baby boomer generation is more highly skilled and educated than previous generations, such part-time work must be challenging, interesting, and rewarding, whether done on a paid or volunteer basis.

²¹ Home-based businesses can provide employment opportunities for entrepreneurs pursuing encore careers after reaching traditional retirement age, as well as for those with limited mobility.

Recreation

QUESTION	ANSWER	COMMENTS
How many acres of public parks currently exist per 1,000 community residents?	acres	
What percentage of households are located within a 1/2-mile of a park?	%	
Which of the following recreational facilities are available in the community:		
Baseball or softball diamond		
Soccer or football field		
Tennis court		
Swimming pool		
Hockey or ice skating rink		
Public access lakes or rivers		
Walking/jogging trails		
Hiking trails		
Hard-surface bicycle trails		
Mountain-bike trails		
Cross-country skiing or snow shoeing trails		
Indoor jogging track		
Gymnasium		
Exercise facility		

For those recreational facilities that do not currently exist, which ones does the comprehensive plan provide for in the future?		
Baseball or softball diamond		
Soccer or football field		
Tennis court		
Swimming pool		
Hockey or ice skating rink		
Public access lakes or rivers		
Walking/jogging trails		
Hiking trails		
Hard-surface bicycle trails		
Mountain-bike trails		
Cross-country skiing or snow shoeing trails		
Indoor jogging track		
Gymnasium		
Exercise facility		
Does the comprehensive plan (or other plan) specifically plan for adaptive recreation opportunities for people of all ages with varying capabilities?		

Entertainment

QUESTION	ANSWER	COMMENTS
Which of the following are located in the community:		
Movie theater		
Live theatre		
Live music venue		
Video rental store		
Outdoor bandstand/amphitheatre		
Sporting event arena		
Arts center or museum		
Other (list)		
For those not located in the community, how far (in miles) is the nearest location from the center of the community?		
Movie theater	miles	
Live theatre	miles	
Live music venue	miles	
Video rental store	miles	
Outdoor bandstand/amphitheatre	miles	
Sporting event arena	miles	
Arts center or museum	miles	
Other (list)	miles	
Does the community's economic development or other plan specifically consider the future entertainment needs of aging residents in the community?		