

The Vital Aging Network

*Progress in organizational development
and program implementation*

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Executive summary

The Vital Aging Network (VAN)

Minnesota's Vital Aging Network (VAN) is a volunteer network of organizations and individuals dedicated to promoting the civic engagement and personal fulfillment of older adults. Since its inception in 2001, the network has sponsored a broad range of educational activities for older adults and professionals in the field of aging. Its current projects include hosting monthly forums on vital aging; offering advocacy and leadership courses for older adults; maintaining a VAN web site and e-bulletin; developing an online "vital communities" Toolkit; and partnering with other organizations to promote the civic engagement of older adults.

Purpose of this study

VAN is supported by a grant from Atlantic Philanthropies (AP). Under the terms of the grant, VAN is required to document its progress in achieving five specific outcomes: 1) the development of an enhanced infrastructure and network of expertise; 2) the development of a business plan; 3) the development and implementation of stronger core programming; 4) an increase in the number of communities adopting core components of VAN's approach and tools; 5) and the development of an evaluation plan and integrated evaluation capacity. The purpose of this report is to summarize VAN's progress in each of these areas.

Evaluation design

To determine VAN's progress in each of the required areas, Wilder Research conducted an extensive review of VAN's program records and documentation, including its previous evaluation reports, strategic plan, monthly VAN bulletins, six-month progress reports, staffing plans, organizational charts, attendance records, web usage reports, and financial records. We also conducted interviews with eight key stakeholders in the Vital Aging Network and administered a brief e-mail survey to all members of the VAN Leadership Group. Collectively, these data sources provided a rich portrait of VAN's ongoing organizational development and efforts at program improvement.

Findings

The Vital Aging Network has either achieved, or made significant progress towards, all of the outcomes prescribed by Atlantic Philanthropies. Findings pertaining to each individual outcome are detailed below.

Outcome 1: Enhanced infrastructure and expertise

VAN has:

- Engaged in a formal strategic planning process
- Acquired a new fiscal agent
- Successfully expanded and engaged its Leadership Group
- Hired paid support staff with professional expertise in the areas of aging, and communications
- Expanded the reach of its Web site and Listserv

The network's success in engaging the interest of the new Leadership Group is especially noteworthy. According to the findings of Wilder's e-mail survey, the current members of the Leadership Group spend an average of 27.9 hours per month, or 335 hours per year, on VAN-related business and activities.

Outcome 2: Development of a business plan

While VAN still relies heavily on AP for its funding, it has:

- Created a fundraising plan for 2008 with 18 specific funding targets
- Created a formal business accountability and review process
- Hired a professional development consultant to assist with the creation of a five year sustainability plan

Outcome 3: Strengthening core programs

During the period July 2007 to present, VAN has:

- Developed a brand new Advocacy Leadership for Vital Aging (ALVA) course curriculum, which will be offered at community colleges around the state

- Developed a plan to begin holding VAN forums statewide and continued monthly VAN forums in the Twin Cities
- Initiated the redesign of its Web site
- Initiated the redesign of the Vital Communities Toolkit
- Formed strategic partnerships with Minnesota's regional Area Agencies on Aging and the Minnesota Association of Area Agencies on Aging

Outcome 4: An increase in the number of communities adopting core components of VAN's approach

As a result of its transition to a new fiscal agent, VAN has not moved forward with some of its community initiatives – such as the development of the Speaker's Bureau training program and the redesign of the Vital Communities Toolkit – as quickly as originally planned. However, the network is currently in the process of rolling out several statewide initiatives including:

- Plans to begin offering its ALVA course statewide through a partnership with Minnesota's State Colleges and Universities
- Plans to begin holding regular regional forums, introducing the VAN Web site and Vital Communities Toolkit, across the state
- Plans to launch a statewide Speaker's Bureau
- Plans to appoint more representatives from throughout Greater Minnesota to the Leadership Group
- Plans to continue building relationships with Minnesota's Area Agencies on Aging

In addition, two of the VAN Ventures created by ALVA graduates (Mapping Your Retirement and the Minnesota Creative Arts and Aging Network) have begun statewide operations.

Outcome 5: Development of an evaluation plan and integrated evaluation capacity

Since receiving its grant from AP, VAN has consistently embraced the concept of evaluation. It has commissioned three separate evaluation studies of its programs and used the results of these studies to improve its programs and services. For example:

- The findings from VAN's ALVA alumni surveys and ALVA focus groups have been used to shape the new ALVA course curriculum
- The findings from VAN's Web site focus groups and user surveys are being used to help plan and redesign the VAN Web site
- The findings from VAN's focus groups on the Vital Communities Toolkit are being used to reorganize and re-envision the Vital Communities Toolkit
- Data on the skills, expertise, and diversity of the current Leadership Group are being used to guide the recruitment of new Leadership Group members

This pattern of immediately using program data and evaluation results to guide and improve programming and operations clearly marks VAN as a "learning" organization.

With support from Wilder Research, VAN's Leadership Group has also developed a formal evaluation plan for the next three years.

Next steps and issues to consider

VAN's plans for rapid growth and expansion throughout the state will bring a number of new challenges. As the network continues to grow, VAN's Leadership Group may want to consider the following issues and questions:

- How will the network secure adequate staff and volunteer support for all its programs and activities? (Right now, some members of VAN's Leadership Group are burdened with multiple and substantial responsibilities.)
- How can the network broaden its message and programming to appeal to a more ethnically, racially, and economically diverse population?
- How can the network broaden its funding base, so it is not overly reliant on support from AP and other foundations?
- What are the precise elements of the VAN model that the network hopes to replicate more widely, and how, precisely, should the model be implemented to achieve the best possible results?

These are complex and challenging issues. However, VAN's recent successes in the areas of organizational development and program strengthening, and its demonstrated history as a learning organization, bode well for the network's future success.

Background, mission, and structure of the Vital Aging Network

VAN background

Minnesota's Vital Aging Network (VAN) is a volunteer network of organizations and individuals dedicated to promoting the civic engagement and personal fulfillment of older adults.

The network was founded in 2001 by three of the area's leading advocates for older adults: Dr. Jan Hively, formerly a senior fellow at the University of Minnesota College of Education and Human Development, Dr. Hal Freshley, Policy and Planning Coordinator for the Minnesota Board on Aging, and Darlene Schroeder, Program Administrator for Aging and Adult Services for the State of Minnesota.

The idea for VAN grew directly out of Dr. Hively's dissertation research at the University of Minnesota. Her 2001 study of "Productive Aging in Rural Minnesota" revealed that the state's older adult population was significantly more active, engaged, and potentially productive than traditional stereotypes of the "elderly" would suggest. VAN was created to tap into and channel this vital resource.

VAN mission and activities

Since its inception, VAN has pursued the same basic mission: to promote self-determination, community involvement, and personal enrichment for and with older adults through education and advocacy.

The network seeks to fulfill this mission by organizing and sponsoring a broad range of activities and programs for older adults and aging professionals. Its past and current activities include:

- Sponsoring free monthly forums, at which experts speak on a variety of topics related to "vital aging," including housing, transportation, arts, civic engagement, spirituality, physical and mental health, continuing education, etc.
- Publishing a monthly e-bulletin with information on VAN forums and activities, articles and resources on healthy aging, and listings of aging-related workshops and programs, and articles of interest to older adults

- Developing and delivering the Advocacy Leadership for Vital Aging (ALVA) Program – a continuing education program designed to teach older adults the leadership and advocacy skills necessary to become civic leaders in their communities
- Developing the “Vital Communities Toolkit” – a Web-based toolkit that helps individuals and community leaders identify potential civic engagement opportunities that could improve their communities for seniors
- Training and sponsoring a team of public speakers who provide lectures and presentations on civic involvement and other topics related to VAN
- Maintaining a VAN Web site featuring information and resources on healthy aging, lifelong learning, opportunities for civic engagement, and other areas of interest to vital agers
- Providing ongoing financial support, expertise, and networking opportunities to some of the most successful civic engagement projects developed by graduates of the Advocacy Leadership for Vital Aging Program. These projects are commonly referred to as “Van Ventures”

VAN also regularly collaborates with other Minnesota organizations to promote civic engagement projects and initiatives of interest to older adults. For example, several members of VAN’s leadership group are currently participating in a Citizen’s League Initiative to rethink the definition and structure of long-term care in Minnesota.

Organizational structure and financing

VAN is currently an affiliate of the Metropolitan Area Agency on Aging (MAAA), which provides office space for the network and acts as its fiscal agent.

The network’s day-to-day operations are presided over by a Leadership Group consisting of approximately 17 to 22 volunteers who are either vital agers or aging services professionals. Smaller committees and task forces of three to four members direct the network’s policy and programming in different areas; for example, there are currently VAN committees and task forces in Branding and Marketing, Networking and Education, Nominating and Governance, Financial Development, Communications, and several other program areas.

VAN also maintains two paid staff members: a full-time program coordinator and a part-time communications specialist.

Since 2005, the Network’s operations have been supported by a \$650,000 grant from the Atlantic Philanthropies (AP).

Study design and method

Desired outcomes

The Atlantic Philanthropies grant awarded to the Vital Aging Network in 2005 was specifically intended to help VAN expand its organizational capacity and strengthen its core programming. Under the terms of the AP grant, VAN is required to document its progress in achieving the following short- and medium-term outcomes:

- The development of an enhanced infrastructure and network of expertise that would allow VAN to expand its operations and reach a broader audience
- The development of a business plan focused on revenue generation and sustainability
- The development and implementation of stronger core programming
- An increase in the number of communities adopting core components of VAN's approach and tools
- The development of an evaluation plan and integrated evaluation capacity

VAN's June 22, 2005, agreement with Atlantic Philanthropies also outlines two longer-term outcomes that AP hopes will eventually result from VAN's work:

- More positive perceptions and treatment of older adults
- Increases in civic engagement among older adults

However, VAN is not required to document its progress towards these longer term outcomes during its initial three-year-period of AP funding. (A copy of AP's original list of desired outcomes, including the accompanying logic model is included in Appendix 1.)

Methods and data sources

In December 2007, VAN contracted with Wilder Research to prepare a summary report on VAN's progress-to-date. To assess VAN's performance in achieving AP's required outcomes, Wilder utilized a mixed-method evaluation approach, drawing on both quantitative and qualitative data sources.

Wilder's research team:

- Conducted an extensive review of VAN's program records and documentation, including its strategic plan, monthly VAN bulletins, six-month progress reports, staffing plans, organizational charts, and financial records
- Conducted semi-structured interviews with eight key stakeholders in the Vital Aging Network, including the organization's founder, representatives of the current VAN Leadership Group, and both members of VAN's paid staff
- Conducted semi-structured interviews with six graduates of the Advocacy Leadership for Vital Aging program
- Conducted a brief, informal e-mail survey of all current Leadership Group members to determine their respective roles, responsibilities, and personal time commitments to VAN
- Conducted a retrospective analysis of all existing attendance records and client satisfaction data from the VAN forums and ALVA classes
- Conducted a retrospective analysis of all existing usage records and user satisfaction data from the VAN Web site, VAN's Vital Communities Toolkit, and the VAN Listserv
- Gathered and analyzed all available media coverage about VAN and VAN's activities
- Reviewed the findings from three previous evaluations of VAN programs prepared by the University of Minnesota's Center for Applied Research and Educational Improvement

Collectively, these data sources provided a rich portrait of VAN's ongoing organizational development and efforts at program improvement.

Findings

Wilder's review of the data suggests that the Vital Aging Network has either achieved, or made significant progress towards all of the short- and medium term outcomes prescribed by Atlantic Philanthropies.

The findings pertaining to each individual outcome are detailed below.

Outcome 1: Enhanced infrastructure and expertise

Over the past three years, VAN has made a number of significant improvements to its organizational infrastructure and expertise.

Strategic planning

During the period 2006-2007, VAN engaged in a formal strategic planning process. This process allowed the members of VAN's Leadership Group to agree upon several clearly defined goals and priorities. As prescribed by the 2007-2009 Strategic Plan, VAN is now focusing its resources and talents on achieving the following three strategic goals:

1. Fostering Older Adult Civic Engagement through Leadership Development
2. Coordinating Educational Forums Across Minnesota to Promote Vital Aging
3. Developing Key Relationships and Strategically Partnering on Initiatives to Further Vital Aging in Minnesota

The very act of setting these goals represents an important milestone in VAN's organizational development; it reflects VAN's gradual progression from a loosely defined network of individuals and organizations – often referred to as a “network of networks” by VAN's founder Jan Hively – to a more structured, results-oriented organization.

Organizational restructuring and leadership development

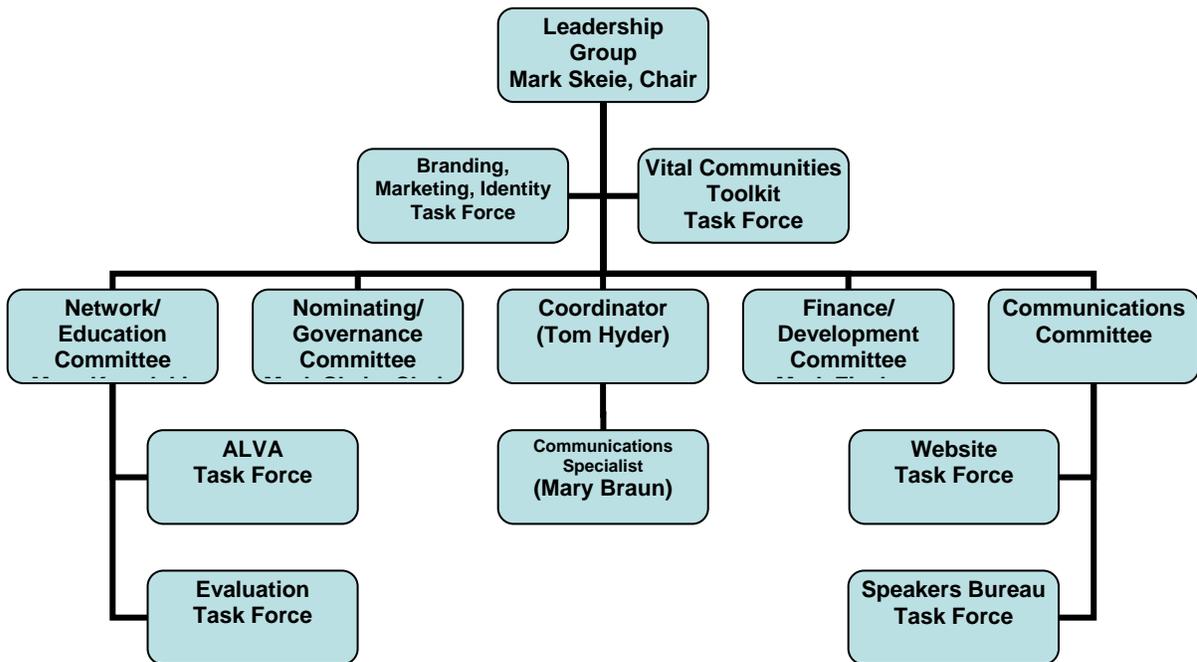
VAN has also made significant strides in the areas of organizational restructuring and leadership development. During the first two years of its AP grant cycle, VAN relied heavily on its original fiscal agent, the University of Minnesota's College of Continuing Education, to provide leadership and staff support for most VAN activities.

However, in April 2007, VAN chose its end affiliation with the University and to partner instead with the Metropolitan Area Agency on Aging (MAAA). MAAA was perceived

to be an ideal fiscal agent for the network because of its shared focus on the issues of aging and improving the quality of life for older adults.

Under the aegis of MAAA, VAN’s Leadership Group has taken direct control of planning and implementing most of the network’s activities. All Leadership Group members now serve on at least one committee devoted to planning, implementing, or improving a specific area of VAN programming (e.g., the ALVA Task Force, the Communications committee, Website Task Force, etc.).

VAN’s current leadership group and committee structure



Many members of the Leadership Group have also voluntarily enrolled in a formal “Civic Organizing” course, which has helped them to enhance their leadership skills and to arrive at a common vision of civic engagement.

These developments appear to have led to a dramatic increase in the level of enthusiasm and engagement of VAN’s Leadership Group. According to program records and key stakeholder interviews, membership and attendance rates for the Leadership Group declined steadily during the final months of VAN’s affiliation with the University. In contrast, an April 2008 e-mail survey conducted by Wilder Research indicates that the current members of the Leadership Group spend an average of **27.9 hours per month, or 335 hours per year, on VAN-related business and activities.**

This represents a remarkable time commitment for volunteer board members – especially when one considers that the average senior citizen in the United States devotes between 60 and 90 hours per year to volunteer activities.

VAN also recently began a systematic campaign to diversify and expand its Leadership Group. The network recently appointed an African-American Leadership Group member and it plans to add at least two other new Leadership Group members from ethnically diverse communities in the next year. In addition, VAN is developing a plan to add representatives from all five regions of Greater Minnesota to the Leadership Group in 2008.

In making new appointments to the Leadership Group, VAN is attempting to consider not only the need for racial, ethnic, and geographic diversity, but also the need for certain skill sets and backgrounds that will enhance the organization's capacity. In March 2008, VAN's Program Coordinator assembled a matrix of the current Leadership Group's skills and areas of expertise (Appendix 2). This matrix suggests that the Leadership Group has an exceptionally strong background in the areas of nonprofit management, community education, and elder support, but it could benefit from additional legal, financial, and corporate expertise.

Staff support and expertise

Since discontinuing its affiliation with the University of Minnesota, VAN has hired one full and one part-time staff member to support the network's operations. Tom Hyder, an experienced expert in the fields of community education and elder issues, is now serving as VAN's full-time Program Coordinator. His responsibilities include the overall coordination and administration of the VAN Leadership Group, VAN initiatives, and development activities. Mary Braun, VAN's half-time Communications Specialist, maintains the network's Web site and Listserv, publishes the monthly VAN e-bulletin, and produces VAN's current publicity and promotional materials. She is also working with the Leadership Group's Communication's Committee and Marketing Task Force to create a new VAN brochure and to establish a new branding and marketing strategy for VAN.

Expanded communications and outreach activities

Throughout the period July 2007–May 2008, VAN has worked steadily to expand and improve its communications materials and infrastructure. As described above, VAN's Communications Specialist, Mary Braun, is currently working with the Leadership Group's Communications Committee and Marketing Task Force to create a new VAN brochure, marketing materials, and branding strategy. The committee hopes to have a formal marketing plan and branding strategy in place by September 2008.

VAN also publishes a monthly e-bulletin and Listserv with 2,290 subscribers and regularly issues press releases promoting VAN forums and other VAN-related events and activities. In addition, the network maintains its own Web site, which serves as an important information hub for older adults, aging experts, and anyone interested in topics related to vital aging.

According to usage statistics collected with the Web tracking program Webaziler, the popularity of VAN's Web site has increased significantly over the last 12 months. In May 2007, the site received an average of 413 hits per day; by the end of March 2008, this number had almost doubled to an average 800 hits per day, or 24,800 months hits per month.

In an effort to further expand and diversify VAN's virtual audience, VAN is also currently funding a major "redesign" of the Web site. A series of 2006 focus groups with typical users suggested that many visitors to the "old" Web site found it informative, but difficult to navigate. As a result, the new Web site is being designed to meet the specific needs of older adults, and it will include such features as scaleable text, easy-to-use navigation tools, and accessibility standards for the visually impaired. VAN's Web site contractor, Julie Roles, expects the new site to be up and running by July 2008.

Partnership formation

Finally, VAN has sought to leverage its resources and augment its own organizational infrastructure and expertise by partnering with many other state and local organizations that share a commitment to vital aging, community education, and civic engagement. Since its transfer to MAAA in June 2007, VAN has developed formal or informal partnerships with more than 20 organizations including:

- AARP Minnesota
- Century College
- Elderberry Institute
- The ElderCare Rights Alliance
- The MN Association of Volunteer Administrators
- The Hennepin County Public Libraries
- The Minnesota Association for Continuing Adult Education
- The Minnesota Board on Aging

- The Minnesota Senior Federation
- Minnesota Home Care Association
- U of M Center on Aging
- Volunteers of America MN
- Dakota Area Resources and Transportation for Seniors
- RSVP
- Invisible Force
- Care Providers of MN
- MN Health and Housing Alliance
- Lutheran Social Services

Some of the most important strategic partnerships the network is currently pursuing include:

- A partnership with the Citizen’s League to develop new ways of thinking about long-term health care
- A partnership with Minnesota State Colleges and Universities (MNSCU) that would allow VAN to offer its ALVA course around the state
- A partnership with MN Association of Area Agencies on Aging and the MN Rural Health Association, which is designed to bring the VAN Forums and other VAN programs to communities throughout the state

VAN has also helped foster the development of three “VAN Ventures.” These are affiliated nonprofit organizations that were originally created by participants in VAN’s ALVA course. Currently there are three active VAN Ventures:

- [MYR, Inc.](#), is the publisher of *Mapping Your Retirement: A Personal Guide to Maintaining Your Health, Managing Your Money, and Living Well* and the creator of an accompanying retirement planning course.
- [Environmental Force](#) is a registered 501(c) (3) organization focused on involving older adults in environmental reform and creating a healthy environment for future generations.

- [The Minnesota Creative Arts and Aging Network \(MnCAAN\)](#) is a registered nonprofit network of Minnesotans dedicated to fostering the vital relationship between creative expression and healthy aging.

All three of these VAN-inspired organizations have made notable contributions to the civic life and engagement of Minnesota's older adults. For example, MYR's retirement mapping course is now being offered at several community colleges, and its retirement workbook has been prominently featured in such publications as the Star Tribune and USA Today. Environmental Force helped organize one of VAN's most popular public event to date (an extremely well attended [over 650 participants] presentation on the effects of global warming by the well-known environmentalist, Will Steger); and MnCAAN is currently collaborating with Twin Cities Public Television to produce a half hour video on the benefits, and importance of, providing older adults with expanded opportunities for creative engagement.

Outcome 2: Development of a business plan

At the present time, VAN still relies on its grant from Atlantic Philanthropies as its primary source of revenue. However, the network has formed a Finance/Development Committee (chaired by Mark Fischer, President of Fischer on Finance), and engaged a development specialist to assist with grant writing and fundraising efforts.

In March 2008, the Finance Committee reviewed an extensive list of potential funders and identified 18 promising prospects and funding opportunities to be pursued in 2008.

VAN's targeted foundations and funding sources for 2008

Potential funding source	Size of potential award/grant	Application deadline	Application status
Stevens Square Foundation	\$40,000	3/1/2008	Submitted
Hugh J. Andersen Foundation	\$2,000	5/1/2008	Submitted
Curtis L. Carlson Foundation	\$2,500	4/15/2008	Submitted
St. Paul Foundation	\$25,000	5/1/2008	Submitted
Hugh J. Anderson Foundation	\$10,000	3/15/2008	Rejected
Elmer and Eleanor Andersen Foundation	\$15,000	5/1/2008	Submitted
F.R. Bigelow Foundation	\$20,000	5/1/2008	Submitted
Mardag Foundation	\$15,000	5/1/2008	Submitted
Traveler's Foundation	\$15,000	5/16/08	In development
Jay & Rose Phillips Family Foundation	\$2,500	7/15/2008	In development
Simmet Foundation	\$5,000	10/1/2008	In development
ADC Foundation	\$5,000	Rolling submission	In development
Bremer Foundation	\$1,500	Rolling submission	In development
Whitney Foundation	\$1,000	Rolling submission	In development
Health Partners	\$2,000	Rolling submission	In development
Northland Foundation	\$15,000	Rolling submission	In development
Kentron Foundation	\$5,000	Rolling submission	In development
Kopp Family Foundation	\$10,000	Rolling submission	In development

Source: Vital Aging Network, 2008

Grant applications have already been submitted to seven of these funding prospects and two more applications are currently in development.

VAN's finance committee has also created a formal process for assigning business development responsibilities to VAN Leadership Group members. Under this process, known as the "VAN Projects-Periodic Business Review and Accountability Process," Leadership Group members take turns overseeing fundraising and development activities in five high priority areas (AP Renewal, Foundations, Donors, Large Donors, and Database/VAN partner development). VAN's overall progress in fundraising is reviewed and discussed every month by the full Leadership Group, and a new schedule of development assignments is issued every quarter.

In addition, VAN is working with its development consultant (Fox Consulting) to develop a formal five year sustainability plan. In putting together this sustainability plan, VAN is considering a number of different funding strategies and options – including the options of adopting a different organizational model, based on paid membership dues, and generating more revenue through VAN’s courses and the VAN Ventures.

Outcome 3: Strengthened core programming

VAN has generally taken a systematic approach to strengthening its core programs, collecting client and user satisfaction about each program area and using this information to guide program development.

ALVA course development

During the period 2003-2006, VAN offered three sessions of its ALVA course. Ninety participants graduated from the course after completing the required field work. Their field work projects encompassed many different types of civic engagement and community service, including community education campaigns, research and data analysis projects, organizational capacity building projects, public policy initiatives, and the development of a variety of new programs and services for older adults.

Some of the specific projects that were completed during the first three years of the course included:

- Coaching seniors in how to navigate the Medicare system and select health care plans under Medicare Part D.
- Developing a manual for students and health professionals on “holistic approaches to working with seniors.”
- Assisting in the production of a University of Minnesota-sponsored video on the vital aging movement. This video was subsequently shown at VAN’s first statewide summit on aging and a variety of other educational events.
- Creating a college course on planning educational programming for older adults. This college course was subsequently offered at the U of M for three years.
- Bringing older adults from the community into classrooms to work with high school students studying health and nutrition.

Many of the graduates who completed these projects went on to become very active in VAN. In fact, a majority of VAN's current Leadership Group first became involved with the network through the ALVA course, and several ALVA graduates have also gone on to launch their own VAN-affiliated nonprofit organizations, known as VAN Ventures.

Pre- and post-class surveys administered to two ALVA cohorts indicate that most participants felt the course enhanced their general knowledge of leadership, networking and partnership development, generational differences, and other key topics related to vital aging.

In 2006 the University of Minnesota's Center for Applied Research and Educational Improvement also surveyed all known ALVA Alumni about their attitudes, opinions, and satisfaction with the course. Over half of the course graduates (51 alumni) completed and returned the mail-in survey. Their responses indicate that the course was generally seen as "beneficial, informative, and well-designed," with over 75 percent of the survey respondents rating the course favorable across all dimensions.¹

A sample of six ALVA graduates interviewed for this report also described their experiences with the course very enthusiastically. All six of them reported that the class was an important learning experience for them, making them more aware of senior issues, helping them to develop better leadership skills, and providing them with valuable networking opportunities. In addition, all six felt that the class had a significant long-term impact on their thinking, behavior, life choices, or professional activities.

"The knowledge I gained has helped me to form my messages in my work," said one respondent. "I am traveling to India to be a health coach, and I will be carrying my message of the holistic health care approach with me."

"I was recently on a TV show to talk about how seniors are relevant to this society," reported another. "On the show, I am shown sky diving and having to convince others to go with me...I continue to be aware of senior issues, and, when necessary, I am inspired to take action to inform or help others."

"The ALVA course had a significant impact on my life," added a third respondent. "It gave me the confidence to return to graduate school. I developed both personally and professionally as a result of taking the course, and I pass along many of the skills I developed to my students when I teach a class."

¹ Center for Applied Research and Educational Improvement, Vital Aging Network Evaluation Report, 2007.

Despite the course's positive reception, the original design model for ALVA did not prove to be financially sustainable. In addition, some ALVA graduates indicated in their alumni surveys that the course would benefit from a greater focus on long-term civic engagement, and several participants from outside the Twin Cities region suggested that the course should be made more readily available to potential students across the state.

To address these concerns, VAN's ALVA Task Force has significantly revised the original ALVA course curriculum. Under the new curriculum, the course has refocused on leadership and civic engagement, and has been expanded to allow students more time for planning and implementing their individual field work projects. Participants will now spend nearly half of every ALVA session working to develop their projects and long-term plans for civic engagement.

To make the course more accessible to Vital Agers outside the Twin Cities region, the lecture portion of the course will be broadcast via I-TV to a network of community college classrooms across the state. In addition, all course participants (and ALVA alumni) will have access to a new ALVA Web blog, which will serve as a communications and networking tool.

VAN has reached an agreement with Century College to be the initial class site and host school for the new course. VAN is currently in negotiations with three other colleges that are interested in serving as satellite schools (Bemidji NW Technical, Winona State, and Inver Hills Community College). VAN's ALVA Task Force anticipates that the new statewide version of the course may attract as many as 80 course participants per academic year – almost triple ALVA's previous enrollment levels.

The first session of the revised ALVA course is scheduled to begin in October 2008, and VAN will continue refining and strengthening the course design as new enrollment figures and course evaluation information becomes available.

VAN forums development

VAN's monthly forums provide many older adults with their first introduction to VAN and the concept of vital aging. Historically, the majority of the forums have focused on topics directly related to VAN or vital aging. For example, there have been forums on rethinking retirement, the arts and aging, maintaining healthy brain development, etc. However, some forum events have focused on political, environmental, or civic issues of much broader interest (e.g., Will Steger's talk on global warming and another recent forum on "Facing Race").

The results of satisfaction surveys handed out at VAN forums in 2006-2008 suggest that most attendees find the forums informative and engaging – regardless of the topic. On a scale of 1-5, the average respondent rates the forum’s “usefulness to them as a 4.6.

Nevertheless, attendance at the forums has varied dramatically depending upon the speaker, the topic, and the location of the event. While Will Steger’s much publicized forum was attended by over 650 people, some of the monthly events attract less than 20 attendees.

To encourage greater participation, VAN has recently developed a plan to hold “regional forums” across the state through a partnership with Greater Minnesota’s five Area Agencies on Aging and the MN Rural Health Association. These forums will focus on introducing new audiences to VAN and its programs. They will also serve as an opportunity for VAN to market its new ALVA course, updated Web site, and a revised version of the Vital Communities Toolkit. Using these resources, attendees will be encouraged to develop their own vital aging forums, initiatives, and “mini-VANS” in communities throughout the state. VAN plans to launch its first regional/Greater Minnesota forum in July 2008.

VAN is also scheduled to sponsor an important forum on addressing the needs of Minnesota’s Latino community on August 12, 2008. This forum will feature a presentation by the staff of the Comunidades Latinas Unidas En Servicio (CLUES). CLUES is Minnesota’s premier provider of behavioral health and human services to the Latino community, and VAN is hopeful that working with this organization will help the Vital Aging Network to broaden its audience and participation.

A complete schedule of VAN’s upcoming forums in the Twin Cities region is available online at <http://www.vital-aging-network.org/>

Improving the Vital Communities Toolkit

VAN is currently in the final stages of developing a revised version of its Vital Communities Toolkit. The new toolkit will feature an all new design and organization intended to provide vital agers and community planners with more concrete examples of how to create “Vital Communities.” Some of the basic features of the new kit include:

- An introduction to, and definition of, the concept of Vital Communities
- Planning 101: An online guide to community planning, specifically intended for Vital Agers who have never done community planning work before

- A library of recommended surveys, checklists, and tools that are available for use in planning “Vital Communities” initiatives
- A listing and description of model vital communities and community planning initiatives

Most of these resources are being developed in direct response to a series of focus groups VAN and MAAA held with community planners in 2008.

The revised version of the Toolkit and the updated Web site will be officially launched in July 2008 in conjunction with VAN’s plans to hold regional forums across the state.

Development of VAN’s Speaker’s Bureau

The members of VAN’s past and current Leadership Group routinely deliver speeches and public presentations on vital aging and the Vital Aging Network. Current Leadership Group Chair, Mark Skeie; Past Leadership Group Chair, Kris Orluck; and VAN Program Coordinator Tom Hyder all report that they give formal presentations on VAN-related topics at least once a month. In addition, VAN’s founder Jan Hively has presented almost 200 formal talks and presentations on vital aging to different organizations throughout Minnesota and across the nation.

VAN’s Leadership Group also recently formed a Speaker’s Bureau Task Force, which is developing plans for a statewide Speaker’s Bureau that will train new speakers to make VAN-related presentations throughout Minnesota. The Task Force has begun recruiting potential speakers for the Twin Cities area, and will recruit additional speakers statewide concentrating on one region at a time. It is anticipated that recruiting will begin in either the Crookston/Bemidji or Winona region.

Outcome 4: Adoption of VAN programs and tools in more communities

Plans for statewide programming

As a result of its transition to a new fiscal agent, VAN has not moved forward with some of its community initiatives – such as the development of the Speaker’s Bureau training program and the redesign of the Vital Communities Toolkit – as quickly as originally planned. However, the network is now in the process of rolling out several statewide initiatives that will disseminate VAN’s programs and tools throughout Greater Minnesota. These statewide initiatives include:

- Plans to begin offering its ALVA course statewide through a partnership with Minnesota’s State Colleges and Universities
- Plans to begin holding regular regional forums, introducing the VAN Web site and Vital Communities Toolkit, across the state
- Plans to launch a statewide Speaker’s Bureau
- Plans to appoint more representatives from throughout Greater Minnesota to the Leadership Group
- Plans to continue building relationships with all six of Minnesota’s Area Agencies on Aging

In addition, the network has plans to develop a series of VAN workbooks and training guides describing VAN’s leadership guidelines and principles and offering guidance on how to establish successful forums and promote vital aging.

VAN fully expects these initiatives to result in the more widespread adoption of its core programs and tools, and it eventually hopes to develop at least five affiliated Vital Aging Networks (aka “mini-VANs”) across the state – one for each Area Agency on Aging.

Rapid growth of the VAN Ventures

Two of the VAN Ventures inspired by the ALVA course have also begun to attract to significant attention throughout Greater Minnesota and beyond:

The Mapping Your Retirement (MYR) book developed and published by Mark and Janet Skeie has now sold over 2,000 copies nationwide, and a college course based on the book has been offered at three Minnesota community colleges: Century College in White Bear Lake MN, South Central College in Mankato MN, and Northern College in River Falls WI. In addition, the province of Alberta Canada recently announced that it will be using the MYR book and course materials as the basis for a government-sponsored retirement preparation program. According to Mark Skeie, MYR’s current goal is to be in 300 schools by the end of 2009.

The Minnesota Creative Arts and Aging Network (MnCAAN) has become an extremely active and productive affiliate of the National Center on Creative Aging. It has organized two statewide conferences and one regional conference on creative aging and is now co-producing a half-hour film on “Creative Aging in Minnesota,” which will be shown statewide on Twin Cities Public Television. In conjunction with the launch of the film, MnCAAN is planning an aggressive statewide expansion of its activities, including “roll-out” events in 12 locations throughout Greater Minnesota.

The rapid growth of these VAN Ventures clearly indicates the potential impact that VAN has to affect communities across the country – not only directly through its core programs but also through the affiliated programs and ventures it inspires.

Outcome 5: Building evaluation capacity

Throughout the period 2005-2008, VAN has shown a commitment to expanding its evaluation capacity and to systematically evaluating the implementation and impact of its core programs. During this time, the network has authorized, and helped plan, three separate studies of its programs by outside evaluators:

- The Center for Applied Research’s 2003-2005 Evaluations of the ALVA Program
- The Center for Applied Research’s April 2007 Vital Aging Network Evaluation Report
- This summary report on progress towards outcomes by Wilder Research

In addition, the members of VAN’s Leadership Group have developed and administered their own client satisfaction surveys for the VAN forums and ALVA courses, collected and analyzed attendance and usage data from the VAN Web site, VAN Listserv, and various VAN events, and participated in numerous focus groups and stakeholder interviews to gather qualitative data on VAN programs and operations.

Unlike many other small nonprofits with limited resources, VAN has used this data not only for required reporting purposes, but also for the purposes of continuous program improvement. For example:

- The findings from VAN’s ALVA alumni surveys and ALVA focus groups have been used to shape the new ALVA course curriculum
- The findings from VAN’s Web site focus groups and user surveys are being used to help plan and redesign the VAN Web site
- The findings from VAN’s focus groups on the Vital Communities Toolkit are being used to reorganize and re-envision the Vital Communities Toolkit
- Data on the skills, expertise, and diversity of the current Leadership Group are being used to guide the recruitment of new Leadership Group members
- Updated evaluations from monthly Forum participants are utilized to select topics for future Forums

This pattern of immediately using program data and evaluation results to guide and improve programming and operations clearly marks VAN as a “learning” organization.

In an effort to continue to build its evaluation capacity, VAN’s Leadership Group is now working with Wilder Research to develop a formal evaluation plan for the period 2008-2010. This plan will provide a framework for measuring VAN’s impact on longer-term outcomes, such as increased civic engagement and the development of more “vital communities.”

Wilder Research’s preliminary draft of the evaluation plan is included in Appendix 3.

Issues to consider

While Wilder Research's analysis of the available evidence-to-date suggests that VAN has made significant progress in achieving AP's desired outcomes, it also suggests some potential challenges that VAN will need to overcome to be successful in achieving its long-term goals.

The need for additional staff and volunteer support

VAN is currently in the process of rolling out a broad array of new initiatives and activities. As stated previously, much of the work for these new initiatives is being performed by the members of VAN's Leadership Group, who are devoting significant amounts of time to their VAN responsibilities.

While such a level of commitment is a clear testament to VAN's successes in organizational restructuring and leadership development, it may be unrealistic to expect the members of the Leadership Group to continue performing at this level indefinitely. One key stakeholder interviewed for this study commented "I think I am getting burned out." Another reported that it has sometimes been hard to recruit new Leadership Group members because of the time commitment involved.

To address the problems, without significantly cutting back on VAN's overall level of activity, the network must find ways to supplement its existing workforce. One possible solution is to hire additional staff support (funding permitting). Another may be finding more effective ways to utilize volunteers. At the moment, VAN makes very little use of volunteer labor outside the Leadership Group; it may want to consider recruiting volunteer help for more routine tasks as well.

Rethinking diversity

Recently, VAN has made some significant strides in trying to appeal to a broader, more diverse audience (e.g., the appointment of an African-American Leadership Group member, the organization of the November 2007 "Facing Race" forum, and the upcoming CLUES forum, etc). However, VAN's efforts in this area are somewhat hampered by the fact that relatively few of its programs and products speak to the needs of lower-income individuals. For example, VAN has offered numerous forums on planning for retirement, being creative as an older adult, and becoming more engaged in protecting the environment; but, thus far, it has sponsored only two events on race and ethnicity and one on affordable housing. It has held no forums on the issues of poverty or public safety.

It is important to note that some VAN members have expressed ambivalence over the idea of focusing on topics that do not celebrate the vitality and potential of older adults. After all, one of VAN's central missions is to combat negative stereotypes that depict the elderly as unproductive and a drain on resources. However, it is difficult to imagine how the network will broaden its appeal to individuals of genuinely diverse backgrounds if it continues to focus primarily on issues of concern to middle income professionals and retirees.

Similarly, most of VAN's key information products and communications vehicles are Web-based (e.g., the Web site, the e-bulletin, and the Vital Communities Toolkit). Relying so heavily on internet-based forms of communication and outreach may seriously limit VAN's potential to connect with lower-income individuals, many of whom are not computer literate or do not have regular access to the internet.

If VAN is serious in its commitment to appeal to a more diverse audience, it may wish consider diversifying some of its program offerings and communications strategies as well.

Broadening the funding base

VAN is currently in the middle of developing a new sustainability plan. According to the organization's latest report to AP, it is considering a variety of funding strategies including membership fees and new, internally generated revenues from VAN products and programs. However, all of the financial planning documents that VAN has produced to date suggest that VAN plans to continue relying heavily on foundation support for most of its grant funding.

While this is an obvious and promising resource for VAN to explore, there are a number of other grant-giving entities it may wish to consider approaching in the future. For example, several federal, state, and local government agencies fund programming in areas related to VAN activities, including the National Institute on Aging, the National Endowment for the Humanities, and the Minneapolis Arts Commission. VAN may particularly wish to consider pursuing funding from sources such as the National Institute on Aging once it begins to move closer to its ultimate goal of producing a national model for promoting civic engagement and creating vital communities.

In addition, VAN may be able to broaden its present funding base significantly by seeking funding for very specific programs or initiatives that are of special interest to public agencies and funding sources. For example, the Environmental Protection Agency (not an immediately obvious funding source for VAN) recently launched a national grant program entitled: Making a Difference for the Environment and the Health of Older Adults: Training, Innovation, Outreach and Educational Projects. Such a funding stream

might eventually be tapped in to support VAN's environmental projects and ventures (e.g., the VAN Venture Environmental Force).

Finally, VAN may wish to be slightly more ambitious in its funding requests to foundations and other grant-giving agencies. Eleven of the 18 grant applications it is currently in the process of submitting or developing are for sums of \$10,000 or less. While applying for numerous small grants may be a useful way of testing the receptiveness of potential funders, it is not necessarily the most cost effective use of the organization's development resources.

In short, while VAN's current funding strategy reflects a serious focus on generating new revenue, seeking grant funding from outside the network's traditional sources of foundation and donor support, and applying for larger amounts of funding, may both play an important part in VAN's continued sustainability.

Taking a systematic approach to replication

According to VAN's latest report to AP, the network's vision is to grow and develop from a local, to a regional, to a national organization. Between 2010 and 2013, the organization aspires "to establish vital aging networks across the region and nation which in turn foster and support local vital communities. These local VANs would be locally operated yet linked to a central organization for resource sharing. Tools and practices would be developed and shared locally, regionally and nationally."

As a first step in expanding VAN's scope, VAN has already launched plans to create five regional affiliated networks across Greater Minnesota, and it plans to prepare workbooks and training materials for use by these regional affiliates. However, it is still not entirely clear precisely which "tools and practices" VAN considers most essential for replication, or how it expects these tools and practices to be used together to achieve the desired results. As VAN moves forward with its plans for its regional affiliates, it will be essential for the network to document, as systematically as possible:

- Which components or elements of the VAN approach appear to be having the greatest impact across different communities
- How exactly these program components are being used – either in concert, or separately – to create vital communities, and
- Which organizational capacities and resources appear to be necessary for the successful creation of new vital aging networks.

Without a clearly defined approach and guidance on implementation, many communities may find it difficult to reproduce the original VAN's promising results.

Conclusion

Overall, Wilder Research’s review of the available data suggests that VAN is making significant progress in the required areas of organizational development and the strengthening of core programs.

While VAN still faces some potential challenges in supporting its operations and diversifying its audience, the network has clearly expanded its infrastructure, developed a whole array of “new and improved” products and programs, and begun laying the foundation to expand its reach throughout the state.

VAN’s current Leadership Group has also shown a remarkable level of commitment and enthusiasm for VAN – devoting significant amounts of time to personally developing and implementing most of the network’s organizational and programmatic improvements.

Finally, VAN has consistently demonstrated itself to be a flexible, learning organization – one capable of adapting to new circumstances (such as a change in fiscal agents) and eager to use the data it collects to strengthen its programs and operations.

These findings bode well for VAN’s continued success as it moves forward in its mission to promote the self-determination, community involvement, and personal enrichment of older adults.

Appendix

AP Outcome requirements

Leadership group matrix

VAN evaluation plan

AP Outcome requirements

The ATLANTIC Philanthropies

Exhibit A

June 22, 2005

EXPECTED OUTCOMES

This project includes both organisational outcomes and programme outcomes with each reflecting the strategic goals developed during the past year. The organisational outcomes focus on increasing VAN's capacity to expand its work and the programme outcomes focus on the accomplishments of the work itself.

Short-term organisational outcomes over the first year: *(output)*

- Infrastructure and expertise needed for expansion are in place, with more effective strategies and materials for communications, and marketing
- Evaluation plan with clear outcomes and measures. *(output)*

Short-term programme outcomes:

- Strengthened core programming including the Advocacy Leadership for Vital Aging, Vital Communities and the Speakers Bureau

Medium-term organisational outcomes by the third year of the project:

- Development of a business plan focused on revenue generation and sustainability
- Integrated evaluation capacity through implementation of the evaluation plan

Medium-term programme outcomes:

- Increase in the number of communities adopting core components of VAN's approach and tools

Longer-term, the work accomplished by VAN through this grant contributes to more positive perceptions and treatment of older adults and increases civic engagement among older adults. In addition, VAN potentially can become a model for adoption in other geographies.

THE ATLANTIC PHILANTHROPIES (USA) INC.

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The
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EVALUATION PLAN

To document the programme activities and progress toward the outcomes as presented in the attached model, the Center for Applied Research and Educational Improvement (CAREI) at the University will help VAN design an evaluation plan in year one, implement the plan in year two, and producing a full report by the end of year 3.

The evaluation will be designed to address two sets of questions. The first will focus on VAN's structure and the organisational changes over the next three years as the strategic plan is implemented. The second will focus on the implementation and outcomes of core components including the Speakers Bureau, the Advocacy Leadership programme and the Vital Communities pilot efforts.

In addition, given its unique approach, the evaluation includes an overarching component to explore both the organisation and the programming to describe the VAN model and the process through which the work is integrated into communities. This component is intended to produce a case study of VAN.

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13226 - UMN-CCE Vital Aging Network					
Inputs	Activities	Outputs	Short Term Outcomes	Medium term Outcomes	Longer term Outcome
			Year 1	Years 2 and 3	
Atlantic support Organizational capacity	<p>Organisational development and evaluation activities to enhance VAN's work:</p> <p>Education and advocacy:</p> <p>Forming and strengthening partnerships with organisations that have resources and networks to share</p> <p>Providing useful, relevant research-based information and resources to transform perceptions of aging</p> <p>Linking people who share interests with interest group networks</p> <p>Nurturing and maximising volunteer involvement to guide and shape VAN's work</p> <p>Teaching and helping individuals to be better advocates on behalf of older adults</p>	<p>Key staff/consultants hires</p> <p>New and refined outreach, education and promotion materials & tools</p> <p>Enhanced Vital Communities toolkit</p> <p>Enhanced Advocacy Leadership certificate programme</p> <p>Evaluation system</p> <p>Workplans</p>	<p>Infrastructure and expertise needed for expansion are in place with more effective strategies and materials for communications and marketing</p> <p>An evaluation plan is developed with clear outcomes and measures</p> <p>Stronger core programming including the Advocacy Leadership for Vital Aging certificate programme, Vital Communities and the Speakers Bureau</p>	<p>Business plan developed focused on revenue generation and sustainability</p> <p>Integrated evaluation capacity through implementation of the plan</p> <p>An increase in communities adopting core components of VAN's approach and tools</p>	<p>Decrease in ageism, transformation in how older adults are treated and valued</p> <p>Increased self-determination, community involvement and personal enrichment for and with older adults</p>

VAN Leadership Group, February 2008

Other Skills and Knowledge:

- Bonnie: training/meeting facilitation and developing materials for training e.g., PPT presentations; handouts; worksheets for small group work. Volunteer recruitment, training, retention.
- Jan: National experts and information in field of aging; Know what makes a good private grant proposal & know some foundations; know what makes a viable, strong organization
- Kelly: Volunteer management;
- Pauline: Project Management

Other relationships:

- Bonnie: Community-based organizations; non-profits;
- Dale: Health care connections;
- Jan: National experts and information in field of aging;
- Maddy: Health Dept., Dept. of Human Services; rural legislators;
- Pauline: Arts and Humanities

What skills, knowledge or relationships is the VAN Leadership Group missing?

1. I'm not sure because I don't know what the LG has now. I think establishing relationships with other aging programs having similar programmatic goals would be wise.
 2. Stories. Our meetings are just meetings, there is no sharing of events or anecdotes from the membership. We should have a few minutes at the beginning or end of each meeting to share something, whether an event or a piece of knowledge. We are not doing community building within our organization.
- People of color – ethnic diversity
3. Marketing
 4. Faith communities; Government; Ethnic organizations; Inter-generational experience
 5. The Leadership is a bit on the serious side. The energy is a bit weak, Studies show that the WELLderly have FUN in what they are doing. Are we having FUN yet? Is our goal to get seniors enjoying them selves and their community. I would like to see a bit more frivolity in our mission and of our Leadership Group. Concentrate more on the feelings of individuals and how an upbeat feeling can powerfully change society. Rather than on targeting society/communities as a way to change individuals. Let's concentrate and high-light the Happiness, Health and Longevity of our Seniors. We have so much to Celebrate—less focus on WHATS WRONG.
- mainstream Media contacts/advertising agencies or professional marketing PR firms/Corporate HR connections
6. I think we could use some legal knowledge, and maybe some planning. Otherwise I believe that all the knowledge areas are covered with at least one person! Since I don't know the details of everyone, I believe, we need to build connections with foundations, corporations, diversity, healthcare/LTC.
 7. Since I am new, I cannot comment on this question. I don't feel qualified to provide an adequate assessment. I would hope with expanding the diversity within the leadership group our connections would be expanded enabling the ability to reach a variety of metro and outside communities – enhance our visibility.

8. Lawyer, banker
9. We need people who can give VAN at least 10-12 hours/month. We should have at least 3 strong older (mostly retired) people as potential chairs of the Leadership Group. (They would have communication, leadership and organizational skills.) I think it is important for the chair to be a retiree, though other officers could be employed in the field of aging. We need people who are or have been leaders in other areas of the community. Like retired execs of nonprofits, United Way, foundations, elected officials, newspaper people, etc. Also leaders from libraries, from league of cities or association of counties, and from the media.
10. Minority communities
11. I don't think I've been a member of this group long enough to assess this without reading everyone else's response to the first two questions.

VAN Leadership Group, February 2008

What voices and perspectives are significantly missing from the VAN Leadership Group?

1. We seem light on retired community leaders who are not or have not been involved in some aspect of the aging field.
2. Connections to 'ordinary' people. People who have everyday problems, who are living on Social Security only, etc. We seem to deal only with academics and professionals. That is not a complaint, but an observation. When I speak to people in my work life, I hear their concerns. I am not saying it is our place to address them, but we should know they exist to at least increase our perspectives when planning programs, etc.
3. Ethnic diversity
4. More of the business community with common interest in working on aging
5. I am pleased that VAN is looking to broaden the ethnic background of our group. I think we are also lacking in economic diversity as well.
6. Greater Minnesota; Minorities; 40-50 age group (I think?)
7. Immigrants particularly Hmong, Latino and Somali; Business perspective – involving the corporations. We are good on education and nonprofits but not the for profit sector; maybe government – e.g., LaRae Knatterud or someone from DHS.
8. A broader scope of political views. Liberal and Conservative. If our society is 50/50% Democrat/Republican our Leadership Group may want to be more inclusive of those from the private/business/conservative part of our population. A mix of those who have been successful in the business as well as in the public service arena could be a consideration. Concentrating on how VAN can MAKE money would be welcomed. Begging others for support and then being disappointed with our budget shortfalls is bothersome.
9. I think the strongest one missing is that of the minority and immigrant populations.
10. I cannot assess the current group. The only missing voices and perspective I would recommend are from a diverse group that we are attempting to create with new members and out state communities
11. Disability Community, Diversity
12. Older community leaders from greater MN. If we can look at racial demographics for older people in MN, I could tell you which racial perspectives would be important to include. (I suspect we should have some part of the black community represented, but I am not sure which part.)

VAN evaluation plan

The Vital Aging Network

Proposed Evaluation Plan for 2008-2010

May 2008 – DRAFT

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Introduction

Minnesota's Vital Aging Network (VAN) is a volunteer network of organizations and individuals dedicated to promoting the civic engagement and personal fulfillment of older adults. The network was founded in 2001 by three of the area's leading advocates for older adults: Dr. Jan Hively, formerly a senior fellow at the University of Minnesota College of Education and Human Development, Dr. Hal Freshley, Policy and Planning Coordinator for the Minnesota Board on Aging, and Darlene Schroeder, Program Administrator for Aging and Adult Services for the State of Minnesota.

Since its inception, VAN has pursued the same basic mission: to promote self-determination, community involvement, and personal enrichment for and with older adults through education and advocacy. The network seeks to fulfill this mission by organizing and sponsoring a broad range of activities and programs for older adults and professionals in the field of aging. Some of its past and current activities include:

- Hosting monthly forums on topics related to vital aging
- Offering an advocacy and leadership course for older adults
- Maintaining a VAN Web site and e-bulletin with educational materials on vital aging
- Developing an "online" vital communities tool kit that helps individuals identify opportunities for civic engagement in their communities
- Partnering with other organizations to promote initiatives related to vital aging or the needs of older adults.

During the period 2005–2008, VAN received significant financial support from the Atlantic Philanthropies, which the organization used to increase its organizational capacity and strengthen its core programming. VAN is now poised to begin rolling out its "new and improved" programs across Greater Minnesota, and it plans to duplicate the volunteer-based VAN model in five regions of the state by the end of 2009.

The purpose of the proposed evaluation is to monitor VAN's progress and outcomes in the period 2008–2010 as it seeks to continue:

- 1) Delivering strong core programs that promote the civic engagement of older adults
- 2) Expanding its outreach
- 3) Developing a VAN model for regional and national replication.

Evaluation design

The evaluator will utilize a mixed method evaluation design incorporating a review of program records and existing data, Web-based surveys, key-informant interviews, and case study elements. The evaluation will include three basic components: a process evaluation, a satisfaction evaluation, and an outcomes evaluation.

Process evaluation

The process evaluation will focus on documenting and assessing the implementation of VAN's core programs as the network continues to grow and expand its infrastructure and reach. Specifically, the process evaluation will address the following questions:

- Are VAN's core programs (ALVA, the forums, the Web site and e-bulletin) reaching a broader and more geographically diverse audience?
- Is VAN continuing to expand and diversify its leadership group?
- Do leadership group members remain active from year to year?
- Is the organization sustaining itself financially and is it diversifying its sources of funding?
- Is the organization actively pursuing new partnerships and encouraging the growth of new affiliated organizations (e.g., VAN Ventures or new regional "mini-VANs")?

To answer these questions, the evaluator will conduct a time series analysis of the following output measures, all of which are regularly collected by VAN as part of its administrative record keeping:

- # of active leadership group members
- # of hours volunteered by leadership group members
- # of active leadership group members representing minority or low-income populations
- # of active leadership group members representing regions outside the Twin Cities
- # and location of ALVA classes offered
- # of ALVA graduates
- # and location of forums held
- # of forum participants
- # of Web site users/hits
- # of e-bulletin subscribers
- # dollars raised
- # (and type) of funding sources
- # of new partnership/memoranda of understanding formed with other civic organizations

- # of active VAN ventures
- # of new speakers trained by the VAN Speaker's Bureau
- # of formal Speaker's Bureau presentations.

These measures will be collected from VAN and analyzed by the evaluator annually. The results will be compared against baseline data that was gathered for VAN's interim evaluation report in May 2008.

As noted earlier, VAN currently collects all of the required process measures as part of its routine record keeping--generally recording the data in a simple excel spreadsheet that is maintained by the VAN Program Coordinator. However, as VAN begins to sponsor the creation of "mini-VANs" throughout Greater Minnesota, it may also be useful to create a uniform data log or simple online reporting system to facilitate the process of data collection and reporting across multiple sites. The evaluator will assist with the creation of such a log or reporting system as required.

In addition, the evaluator will document the processes and procedures used to nurture the creation of new regional VANs as part of the case-study project described under the Outcomes Evaluation section of this plan.

Satisfaction evaluation

The second component of the evaluation will focus on measuring participants' satisfaction with VAN's core programs and services. Specifically, the satisfaction evaluation will address the following questions:

- Are participants in the ALVA course satisfied with the course content, structure, and presentation?
- Are attendees at the VAN forums finding the events useful and informative?
- Are users of the VAN Web site and Toolkit satisfied with the tools and information they are finding on these sites?

VAN currently distributes satisfaction surveys to participants in its forums and ALVA courses. The evaluator will review (and adapt as necessary) these existing evaluation instruments to ensure that they adequately measure participants' satisfaction with course/event content, presentation, and logistics.

The evaluator will also develop two new Web-based satisfaction surveys designed to measure user satisfaction with the VAN Web site and VAN's new online Vital Communities Tool Kit. Users will be asked to rate their satisfaction with the Web site and Tool Kit's content, usefulness, and navigability.

Ideally, the Web site and tool kit satisfaction surveys will be administered as "pop-up" questionnaires—to be filled out by visitors/users before they exit the Web site. Such pop-up surveys are relatively inexpensive to design and administer, and they offer the advantage of

recording user impressions while they are still fresh in the users' minds. The pop-up surveys can also be used, as necessary, to record information about user demographics, needs, and interests.

Data from all of the satisfaction surveys will be collected and analyzed by the evaluator annually, along with the process measures described above. The results of the analysis will be reported to VAN and its funding agencies in two annual reports and a final report—to be issued in months 12, 24, and 36 of the evaluation.

Outcomes evaluation

The final component of the evaluation will consist of an impact evaluation examining the extent to which VAN has achieved its desired outcomes.

To guide the selection of outcomes, in early 2008, staff from Wilder Research worked with the members of VAN's Leadership Group to develop a logic model for the network. As this logic model (see Appendix A) suggests, the majority of VAN's activities are currently directed towards achieving three core outcomes:

- Increasing the capacity of older adults to be active and engaged in the civic life of their communities
- Increasing the number of older adults who are actively engaged in the civic life of their communities, and
- Increasing the number of "Vital communities"—across the state and the nation—that have adopted VAN's core programs, tools, or approach to Vital Aging.

VAN's success in achieving these outcomes will be evaluated using the following strategies:

Self-reporting of changes in KSAs

All VAN satisfaction questionnaires will include several questions asking participants to assess, and report on, changes in their own knowledge, skills, or attitudes (KSAs) that may have resulted from their participation with VAN. While such self-reported data must be used and interpreted cautiously, it will provide an immediate (and cost-effective) indicator of whether or not VAN participants perceive themselves to be learning and building their capacity as a result of VAN's programs and services.

ALVA graduate survey

In addition, in Year 2 of the evaluation, all graduates of the ALVA program will be surveyed to determine the course's long-term impact on participants. The survey will focus on identifying any specific changes in participants' behavior that may have resulted from their involvement in the course. For example, it will include questions on whether or not the participants have:

- Continued their field work projects from the ALVA course
- Become more actively involved in VAN
- Become more actively involved in some other community or civic organization

- Helped spearhead or implement initiatives to help make their communities more inclusive
- Become more politically active and engaged
- Returned to school
- Returned to work
- Started a new business venture
- Pursued other new opportunities for personal enrichment.

Participants will also be asked to rate the ALVA course's importance in enabling these new behaviors.

ALVA graduates have been selected as the target audience for this survey, because they receive a higher and more sustained "dose" of advocacy and leadership training than any of the organization's other target audiences (e.g., forum attendees, Web site users, etc.).

Since most participants in the ALVA course appear to have access to the Web, the graduate survey will be administered online. However, paper surveys will be made available for those ALVA graduates who do not have an e-mail address.

If sufficient resources are available, it may also be useful to survey or interview some of the individuals who have been directly affected by ALVA field work projects (e.g., individuals who received coaching on retirement mapping or individuals who learned how to navigate Medicare regulations as a result of ALVA).

The results of the ALVA graduate surveys will be analyzed in Year 2 of the evaluation and reported in the evaluator's second annual report.

Key informant interviews

Finally, during the last year of the evaluation, the evaluator will conduct a series of telephone interviews with "key informants," who are well positioned to assess VAN's overall performance in achieving its desired outcomes.

In an effort to capture the broadest possible range of perspectives on VAN's impact, interview subjects will include a purposive sample of:

- VAN leadership group members
- ALVA graduates
- Forum participants
- Web site users
- Tool Kit users
- Speaker's Bureau representatives

- Van Ventures founders and participants
- VAN Program staff
- Program observers.

These key informants will be asked to discuss both their own personal experiences with VAN and their more general impressions of:

- VAN's organizational development
- The quality of VAN's programs and services
- VAN's impact on the civic engagement of older adults
- VAN's impact on the communities where the organization has been active.

The results of the key informant interviews will be a critical element of the evaluator's final (Year 3) evaluation report.

Case studies

Finally, since VAN's ultimate goal is to develop a model approach for replication around the country, the evaluator will prepare a series of brief case studies of the new regional “mini-VANs” that the network hopes to establish in 2009. (According to VAN's latest report to Atlantic Philanthropies, the organization plans to “duplicate the volunteer-based VAN model in five regions throughout Minnesota by the end of 2009.”)

The purpose of the case studies will be to help VAN and its stakeholders identify:

1. What basic knowledge, resources, and assets are necessary to support the development of new VANs?
2. Which elements of VAN's programs are the best candidates for widespread replication?

The data collection methods for the case studies will be determined, in conjunction with VAN at a later date in 2009, once it has become clear how many regional “mini-VANs” have been successfully established. However, the approach is likely to include site visits to each of the successful spin-off organizations; key informant interviews with regional VAN staff, participants, and observers; and a review of the regional VAN's program records and operating protocols.

The findings of the case studies will be included in the evaluator's final (Year 3) evaluation report.

Summary of data collection activities

A table summarizing the key evaluation questions and data collection methods proposed in this plan appears on the following pages. The logic model used to develop the plan is included in Appendix 1.

VAN 2008-2010 evaluation questions and data collection plan

Key Evaluation Question	Key Indicators	Data Collection Method	Associated Product or Deliverable	Timeframe for Deliverable
Is VAN continuing to expand its organizational infrastructure and resources?	<ul style="list-style-type: none"> ▪ Size/diversity of LG ▪ Funds raised ▪ No. and type of funders/donors ▪ No. of partners ▪ No. of “mini-VANs” ▪ No. of VAN Ventures 	<ul style="list-style-type: none"> ▪ Annual review of VAN’s program records and attendance logs 	<ul style="list-style-type: none"> ▪ Analysis of findings to be included in two annual progress reports and one final evaluation report 	<ul style="list-style-type: none"> ▪ Annual Progress Reports: Months 12 and 24 ▪ Final Evaluation Report: Month 36
Is VAN reaching a broader and more diverse audience?	<ul style="list-style-type: none"> ▪ No. of program participants ▪ No. and location of program venues ▪ No. of Web hits, Tool Kit users, and e-bulletin subscribers ▪ Participant demographic data (if available) 	<ul style="list-style-type: none"> ▪ Annual review of VAN’s program records and attendance logs ▪ Addition of optional demographic questions to all surveys and interview protocols 	<ul style="list-style-type: none"> ▪ Analysis of findings to be included in two annual progress reports and one final evaluation report 	<ul style="list-style-type: none"> ▪ Annual Progress Reports: Months 12 and 24 ▪ Final Evaluation Report: Month 36
Are participants satisfied with the quality of VAN’s core programs and services?	<ul style="list-style-type: none"> ▪ Participant satisfaction ratings for ALVA, the forums, the Web site, and the Vital Communities Tool Kit 	<ul style="list-style-type: none"> ▪ Annual review of data from satisfaction surveys 	<ul style="list-style-type: none"> ▪ Evaluator will develop new or improved satisfaction surveys for all core programs ▪ Analysis of findings to be included in annual and final reports 	<ul style="list-style-type: none"> ▪ New surveys to be developed by week 12 of the evaluation ▪ Annual and final reports due months 12, 24, and 36 of the evaluation

VAN 2008-2010 evaluation questions and data collection plan (continued)

Key Evaluation Question	Key Indicators	Data Collection Method	Associated Product or Deliverable	Timeframe for Deliverable
Is VAN increasing older adults' capacity to be active and engaged in the civic life of their communities?	<ul style="list-style-type: none"> ▪ Self report of new KSAs on satisfaction surveys ▪ Results of ALVA grad survey ▪ Responses in key informant interviews 	<ul style="list-style-type: none"> ▪ Annual review of data from satisfaction surveys ▪ ALVA graduate survey ▪ Key informant interviews 	<ul style="list-style-type: none"> ▪ Evaluator will develop ALVA grad survey instrument ▪ Evaluator will develop Key Informant Questionnaire ▪ Analysis of findings to be included in 2nd annual and final reports 	<ul style="list-style-type: none"> ▪ ALVA grad survey to be developed by month 18 ▪ Key Informant Interview to be developed by month 26 ▪ 2nd annual and final reports due months 24 and 36 of the evaluation
Is VAN increasing the number of older adults who are active and engaged?	<ul style="list-style-type: none"> ▪ Reports of activity from program records and logs ▪ Results of ALVA grad survey ▪ Responses in key informant interviews 	<ul style="list-style-type: none"> ▪ Annual review of VAN program records and logs ▪ ALVA graduate survey ▪ Key informant interviews 	<ul style="list-style-type: none"> ▪ Evaluator will develop ALVA grad survey instrument ▪ Evaluator will develop Key Informant Questionnaire ▪ Analysis of findings to be included in 2nd annual and final reports 	<ul style="list-style-type: none"> ▪ ALVA grad survey to be developed by month 18 ▪ Key Informant Interview developed by month 26 ▪ 2nd annual and final reports due months 24 and 36
Are new "vital communities" adopting VAN's programs, tools, or approach?	<ul style="list-style-type: none"> ▪ New "mini-VANs" established throughout Greater Minnesota ▪ Other documented reports of new communities adopting VAN programs, tools, or approach 	<ul style="list-style-type: none"> ▪ Annual Review of VAN program records and logs ▪ ALVA graduate survey ▪ Key informant interviews ▪ Optional case studies of the new regional VANs 	<ul style="list-style-type: none"> ▪ At VAN's discretion, the evaluator will prepare case studies of the new regional VANs with the goal of identifying "key ingredients for replication" ▪ Analysis of findings will be included in the final report 	<ul style="list-style-type: none"> ▪ Case studies to be completed by month 30 ▪ Final evaluation report due month 36

Appendix A: VAN Logic Model

