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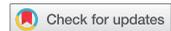
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Pursuing Age-Friendly University principles at a major university: lessons in grassroots organizing

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ABSTRACT

Population aging presents challenges and opportunities that Michigan State University (MSU) is now taking on in a strategic way, but it has been a long road to reach a major milestone of establishing a program called AgeAlive. AgeAlive builds on fifty years of advocacy for coordinated aging-related programming and a more current grassroots effort that has led to a commitment to building an aging network connecting research, education, and outreach efforts based on Age-Friendly University principles. This case study describes AgeAlive's path from inception to a recognized program with a clear vision and strategic plan. Concrete goals include a complete inventory of aging-related activity on campus, a virtual hub for networking and information exchange, educational opportunities for students and elders, and building new retirement pathways. The MSU experience may benefit others interested in developing similar programs by offering strategies for moving forward amidst challenges inherent in large-scale, research-intensive institutions.

KEYWORDS

Age-Friendly University; Age-Friendly Community; program development; intergenerational relationships; community-engaged partnerships; aging; older adults

Introduction

Rapid population aging presents an opportunity for institutions of higher education to address major aging-related public issues facing society that have a direct impact on university students, faculty, and both local and global communities. Students in virtually all disciplines will be working within the context of an aging society post-graduation and need to be prepared as they make career choices and enter the workforce. This includes heightening awareness of aging-related issues, challenges and benefits that affect personal lives, the job market, the economy and other facets of life. There is an intergenerational impact that requires a greater appreciation for and experience with intergenerational relationships. Further, huge numbers of faculty and staff are not only aging themselves but are also caregivers, which has an impact on health, income and productivity (Feinberg & Choula, 2012; Rainville, Skufca, & Mehegan, 2016). Many are near retirement without clear paths to sustaining meaningful work and economic wellbeing (Baldwin & Zeig, 2012; McLaughlin, 2015). Michigan State University (MSU) is therefore now taking strategic strides to address major issues related to the aging of the population, in part through a new program called AgeAlive. These efforts fulfill the University's land-grant mission to work for society's greater good while meeting the needs of students, faculty, staff and retirees.

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A major goal of AgeAlive is to ensure that MSU's collective portfolio of aging-related education, scholarship, service, and community engagement reflects the ten Age-Friendly University (AFU) principles endorsed by the Academy of Gerontology in Higher Education (Dublin City University, 2018; Talmage, Mark, Slowey, & Knopf, 2016). Although MSU currently meets the AFU criteria, it has not yet applied for AFU designation for several reasons. The designation sends an important message to the world about the value and interconnectedness of all ages and should not ring hollow. It shouldn't be about simply "checking off" that criteria have been met but rather making a commitment to an age-friendly campus culture that is reflected in concrete practice. Secondly, such a commitment may result in additional or reallocation of resources, which requires careful planning, coordination, and solid administrative endorsements at the highest level if it is to be sustainable. The goal is to work steadily toward becoming a truly age-friendly university, with full university support, that can represent the distinction of AFU designation well. For large institutions with competing priorities, high-level support may feel elusive or difficult to attain. This case study offers one approach to building campus-wide support that may inform others seeking AFU designation.

The AFU principles are in response to dramatic increases in older adults and longevity throughout the world (He, Goodkind, & Kowal, 2016; United Nations, 2015). They are relevant to any major university that is experiencing the same aging trends as MSU. The AFU framework can guide institutions of higher education in their quest to be age-friendly. Launched in 2012, it encompasses a philosophy based on a holistic definition of quality of life, one that values persons of all ages and abilities. This is AgeAlive's foundational philosophy as well and AgeAlive's core principles directly map to AFU's principles. For example, a focus on developing meaningful retirement pathways aims to fulfill AFU's second principle to promote personal and career development in the second half of life and to support those who wish to pursue second careers. Another key focus area is on intergenerational experiences, which mirrors AFU's fourth principle to promote intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages. For each AFU principle, there are corresponding initiatives.

The following descriptive case study is the MSU story, told to provide others with a sense of what is involved in becoming age-friendly and to provide lessons learned to assist them in their own journey. It describes the iterative process, one in which information and data were continuously collected, analyzed and used to make decisions about "next best steps". As such, findings and recommended strategies are not reserved for the final discussion but presented as they unfolded, allowing others to understand what challenges they may face and potential approaches to minimizing and overcoming these challenges.

Historical context

For Michigan State University, it has been a long road to reach this major milestone of establishing AgeAlive. Advocacy for coordinated aging related programming across the MSU campus started nearly fifty years ago, in the mid-seventies when a University Committee on Aging was established. Over ten years later, in 1989, an administratively approved Center on Aging Studies and Services was established. It lasted approximately two years before dissolving due to "a lack of institutional commitment" (Academic Leadership Program, 1998). Intermittent efforts by different groups, and a loose

confederacy of committed individuals interested in organizing aging activity across campus continued over the next 20 years and met with some sustained successes, such as developing a graduate level aging tract in the School of Social Work. Some of the organizing led to collaborations, which eventually secured substantial external research funding. However, many of the proposed initiatives never came to fruition or their benefits were short-lived and any hopes for a coordinated university-wide unit dedicated to aging remained elusive.

A closer look at this history reveals a common thread throughout; the initiatives never garnered university support in the form of an appointed leader with an institutional home, salary and protected time to devote specifically to building such a program, or other resources necessary to establishing a sustainable organization. As a result, although a rich body of aging-related work exists, including a history of millions in dollars of externally funded research, MSU is one of the few major U.S. universities without a Center on Aging or its equivalent. AgeAlive is the nucleus for such a unit and has the opportunity to shape it using the AFU framework. It exists because one college stepped up to provide an institutional home and salary support for a designated leader with a portion of time dedicated specifically to its development. The evolutionary grassroots process that led to the development of the AgeAlive program and the possibility of a long sought after, clearly identified aging presence on campus is described to inform others who wish to establish an age-friendly institution.

Program development roots

In 2014, Luz, author and MSU gerontologist/researcher, who had been involved in past attempts to organize various aging-related work across campus, and Barbara Sawyer-Koch, MSU Board of Trustee Emeritus discussed MSU's history and the need for a cohesive, campus-wide aging agenda and strategic plan. Among other reasons, they felt it was important for MSU to recognize the serious impact of a rapidly aging population on its students, faculty, and community and to consider a university's role in responding to such dramatic socio-demographic shifts. On a personal level, Sawyer-Koch was a family caregiver for her husband, professor emeritus. On a practical level, they both felt that leveraging aging-related "assets" would be difficult as long as no one knew what they all were. There was no list, centralized database, or way to connect all things aging. They agreed to meet regularly and recruit others to help envision a campus-wide aging program, its purpose and goals, and a strategic plan for meeting such goals. Recruitment was intentional to ensure diversity, deep knowledge of the university or community, and heightened credibility. Lori Strom, from the MSU WorkLife Office, who was a long-time aging advocate joined the group. Others followed, from both the university and the community, for various reasons. Baldwin, author and MSU professor emeritus joined because it resonated with his work on finding alternate ways of retiring so that people stay engaged in life and their wisdom and expertise is not lost.

Whether it was because the timing was right in terms of the aging of the population and people understanding the huge implications of this, or because some of the people were themselves aging and caregivers, or other factors were at work, the group began to grow. It dubbed itself AgeAlive and everyone involved became the "AgeAlive Committee". Committee meeting attendance fluctuated between 6 and 12 individuals, split fairly evenly

between university faculty and community members. In addition to those listed earlier, it was comprised of retirees, caregivers, a financial advisor and other professionals who wish to live in an age-friendly community with ties to the university, faculty from the school of social work and communication arts who conduct aging research, and students interested in an aging-related career. Forming this initial core group was the critical first step. Everyone involved understood that grassroots organizing requires horizontal engagement prior to vertical engagement and institutional change (Barnes & Schmitz, 2016).

At this point in AgeAlive's development, enthusiasm was high. Keeping it high was essential to building consensus on a clear vision and strategic plan that could only materialize through relationships built over time and committed, collective efforts. Therefore, from the beginning, the group leaders consulted the literature on coalition and collaboration building (Lasker, Weiss, & Miller, 2001; Wolff, 2001), community engaged scholarship (Calleson, Jordan, & Seifer, 2005; Commission on Community-Engaged Scholarship in the Health Professions, 2005), and building campus/community partnerships (Community-Campus Partnerships for Health, 2011). This literature also draws on governance and management frameworks for sustainable organizations (Bolda, Saucier, Maddox, Wetle, & Lowe, 2006; Mitchell & Shortell, 2000) and organizational development from a grassroots perspective (Nee, 2016). The following brief description of the process involved in developing AgeAlive provides an initial step-by-step guide on what other institutions might take under consideration as they respond to an aging world.

Program development strategies

During its nascent period, the AgeAlive Committee identified several steps that needed to be taken prior to presenting a proposal to the university. Rooted in the aforementioned literature, the first important step as a group was assessment. Examining MSU's historical climate and institutional efforts over time, presented earlier, and what had attributed to success and failures in the past provided insight into what might be currently feasible. In addition to determining the university context and needs, the group assessed the range of existing models of campus-wide aging programs at other major universities in terms of organizational missions, structures, financing and so forth. This information guided discussion on the form that AgeAlive wanted to take. The committee agreed on a model infused with several principles such as a commitment to a holistic definition of lifelong wellbeing that includes all disciplines, not just medicine, attention to all core activities of the university, not just research, and robust university/community partnerships.

The committee felt that a barrier to administrative endorsement might be lack of knowledge of the vast range and potential of aging-related initiatives already on campus. Therefore, a preliminary assessment of aging-related assets, starting with research was conducted. A research assistant was commissioned to search, off-hours, a database of funded grants accessible through the university's sponsored programs office, using multiple key words related to aging. The findings were dramatic. Even without the ability to tap unfunded research, multiple co-investigators, and other variables that would increase the numbers, approximately 70 principal investigators, spanning almost all academic units, bringing in millions of external funding were identified. This provided compelling

evidence that aging efforts at MSU were worthy of attention, and led to the goal to establish a more comprehensive inventory of not only research, but teaching, service and outreach as well.

From this groundwork of assessment, the next step in organizational development was undertaken, i.e. planning. A vision, mission, objectives, and strategic plan emerged and a summative document written. The group made a commitment to a university-community engaged model, with a holistic definition of health, wellbeing, and quality of life throughout the lifespan. They further stated that they wanted AgeAlive to promote intergenerational programming that would provide opportunities for students in higher education to be exposed to information about aging and for persons of all ages and abilities to interact with each other in mutually beneficial ways. A key objective was to establish MSU as an Age-Friendly University and the AFU principles were attached to the strategic plan. The plan clearly indicated that for AgeAlive to succeed, it was crucial to provide it with an institutional home and hire a person with protected time and resources who would be responsible for daily operations and growth. It also outlined an initial budget and a sustainability plan. All committee members reviewed every draft until consensus was reached. The group then identified key administrators with whom to share the document. They recognized this as an important next step in terms of getting feedback, understanding the challenges and questions others would pose, and cultivating champions. AgeAlive representatives therefore met with deans, chairs, and leaders in university-level units and in aging research or programming. After each meeting, the strategic plan was modified to address questions and concerns that had been raised.

Such an iterative process took time. A full year passed before the committee members felt the strategic plan was ready to present to the provost whose approval was needed to apply for official AFU designation. For various reasons, timing was not right for the university to embrace the proposed ideas. A number of other priorities took precedence but more so, it was clear that the provost had concerns about pursuing AFU designation without more information. Specifically, without knowing what age-friendly strengths MSU currently has, and how far off the AFU designation mark it may be, it was impossible to know what new initiatives would need to be mounted to meet AFU criteria and their associated costs. It presented a cost and resource management risk the university was not willing to take. Further, concern was expressed about how the AgeAlive goals would benefit students whose education is the primary mission of a university. These are reasonable perspectives for a provost to have and this was a critical lesson for committee members. It however did not dissuade the group from continuing to meet together to strategize about how to move forward.

The provost's concern sharpened the idea that a detailed inventory of all of MSU's age-friendly strengths and gaps was an essential next step. It also bolstered the resolve to continue to work toward being an age-friendly campus until AFU designation could be established. Further, it changed AgeAlive's story line to make clear the benefits to students of engaging in learning more about aging issues. This alone advanced the argument for AgeAlive and for becoming an AFU. It provided a persuasive talking point that helped administrators see the relevance to everyday university goals and operations.

Three critical developments then occurred. First, in 2016, MSU announced that the university president was exploring the possibility of building a University Based Retirement

Community (UBRC) on campus. The committee understood the ramifications of this; if the proposed plan eventually moved forward, there would be unlimited opportunities for extending or developing education and programs that advance AFU principles. The person leading this effort was invited to attend an AgeAlive meeting to give a presentation and to learn about AgeAlive's mission. She subsequently joined the committee and became an official, important liaison between AgeAlive and the UBRC planning board, which has helped to legitimize AgeAlive as a respected "voice for aging" on campus.

Secondly, Post, one of the original committee members who worked for the university WorkLife Office (WLO), regularly updated the WLO director on AgeAlive progress. The director became a champion for AgeAlive and the AFU principles, seeing it as aligned with the WLO mission as well as the university's mission and values. She advocated for the work of AgeAlive through financially supporting Post's involvement on the committee, extending invitations to participate in new aging-related university initiatives, and through communications with other administrators and leaders across campus.

Finally, in 2017, fifty years since original aging-related organizing began at MSU, the dean of the college of osteopathic medicine, with whom members had met and maintained contact, decided to give AgeAlive a chance. A half time position for a director of AgeAlive whose role would be to develop a program according to the strategic plan was created. This position was effective December of 2017 and the result is a new college-based program, with university-wide goals. The Committee immediately became the AgeAlive Advisory Board.

Since this quantum leap forward, efforts focused on sponsoring a Campus-Community AgeAlive Forum to announce AgeAlive's existence and mission, showcase aging research from diverse units, including the humanities, and to invite people to get involved. A major goal of the Forum was to start a campus wide discussion about how to engage with an aging world and to create an age-friendly campus. It was a success with approximately 80 people in attendance, split evenly between university affiliates and community members representing a wide range of organizations. Attendees were surveyed; all respondents indicated that an entity such as AgeAlive is important for MSU to support.

Attention has also focused on putting an operational infrastructure in place with the capacity to execute the strategic plan. This includes developing a database that will serve as a centralized depository of information about all MSU aging-activity: the long-awaited asset inventory. The first step involved sending a questionnaire to over 300 people invited to the Forum and enlisting their help in populating the database. Moreover, invitees and survey respondents will also be the nucleus of a digital network for information exchange, news blasts, and community building. The network will be facilitated by a website, listserv, events, and other communication venues.

All of these concrete resources require adequate staffing. As with many new organizations, AgeAlive has limited staff and funds. Therefore, one of the first goals has been to develop a robust volunteer program until other revenue sources are generated. Interns and volunteers are already contributing vital assistance.

Amidst all of these efforts, a recent crosswalk between AFU principles and MSU aging-related assets revealed crucial advances toward a key goal. Between established programs and AgeAlive initiatives, there is now evidence of meeting every AFU principle in multiple ways (Table 1).

Table 1. Evidence of meeting Age-Friendly University (AFU) criteria.

AFU Principles	Select Examples of MSU Assets
(1) To encourage the participation of older adults in all the core activities of the university, including educational and research programs.	<ul style="list-style-type: none"> ● Retirees Association sponsors monthly meetings, extensive outreach programs, speaker series, volunteer and job opportunities, etc. ● Alumni Association offers Alumni Clubs, Events, Career Resource Center, Grandparent's University, etc. ● Faculty Emeriti Association offers monthly meetings with speakers. ● AgeAlive engages older adults through inclusion on Advisory Board, communication hub, volunteer opportunities, life enrichment activities related to education and research, etc.
(2) To promote personal and career development in the second half of life, and to support those who wish to pursue second careers.	<ul style="list-style-type: none"> ● MSU WorkLife Office sponsors a university wide Retirement Pathways Committee dedicated to facilitating engagement and transitions over the life span and meaningful retirement. ● HR facilitates planning of later-life career opportunities.
(3) To recognize the range of educational needs of older adults (from those who were early school-leavers through to those who wish to pursue master's or PhD qualifications).	<ul style="list-style-type: none"> ● Alumni Association Oxford Online Education Series ● AgeAlive partnership with IMPART Alliance to offer training classes for paid and unpaid/family caregiving ● Inclusion and Intercultural Initiatives funded project to develop intergenerational curriculum on aging and caregiving.
(4) To promote intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages.	<ul style="list-style-type: none"> ● Work of the university 60/50 aging subcommittee including sponsoring an intergenerational film competition in which young adults produced 5-minute videos of themselves interviewing an important elder in their lives.
(5) To widen access to online educational opportunities for older adults to ensure a diversity of routes to participation.	<ul style="list-style-type: none"> ● The Alumni Association Oxford Online Education Series ● Research on technology across the life course and ways in which to use it to enhance quality of life for older adults.
(6) To ensure that the university's research agenda is informed by the needs of an ageing society and to promote public discourse on how higher education can better respond to the varied interests and needs of older adults.	<ul style="list-style-type: none"> ● AgeAlive's searchable database of all aging-related research, communication hub to connect researchers, networking events, research lecture series, annual AgeAlive Forum, etc. ● The Pearl J. Aldrich Endowment in Gerontology awards support graduate student and faculty research, education, and service activities in gerontology-related programs.
(7) To increase the understanding of students of the longevity dividend and the increasing complexity and richness that aging brings to our society.	<ul style="list-style-type: none"> ● The MSW Levande program and BASW Certificate in Aging ● Adult Gerontology Clinical Nurse Specialist Graduate Certificate ● AgeAlive work with the Residential College in the Arts and Humanities to develop an undergraduate session on aging
(8) To enhance access for older adults to the university's range of health and wellness programs and its arts and cultural activities.	<ul style="list-style-type: none"> ● The College of Music offers older adults music education classes, intergenerational teaching, concerts at senior living facilities, and music therapy clinical services.

(Continued)

Table 1. (Continued).

AFU Principles	Select Examples of MSU Assets
(9) To engage actively with the university's own retired community.	<ul style="list-style-type: none"> • Retirees Association, Alumni Association, AgeAlive, WorkLife Office and other initiatives
(10) To ensure regular dialogue with organizations representing the interests of the aging population.	<ul style="list-style-type: none"> • AgeAlive Board includes AARP, Age-Friendly Community reps, and others representing interests of older adults • AgeAlive partners with AARP, Age-Friendly Community planning committees, Neighborhood Centers and other groups that provide life enrichment and lifelong educational opportunities to older adults.

Such information provides compelling evidence when seeking both administrative and external support. It can demonstrate that an institution actually has a history of commitment to aging and may already meet AFU criteria, as well as the value of a program such as AgeAlive to shine a light on, showcase, and leverage these institutional assets. This represents a turning point for AgeAlive, which plans to move forward now with AFU designation. As MSU assets are mobilized, stature as an age-friendly university will grow as will the ability to more effectively meet the higher education needs of students and the lifelong education and quality of life needs of elders. Program development will continue for years to come but AgeAlive has entered a new phase, it has moved from grass root organizing to an institutional program.

Current program description

This backdrop of AgeAlive's evolutionary development has led to the current program, which is framed by the following:

- Vision Statement: To strive for a world in which there is respect, dignity and quality of life for all people of all ages and abilities.
- Mission Statement: Connect MSU scholarship, programs and initiatives that share a common goal of increasing wellbeing and quality of life across the lifespan to achieve more efficient and effective use of resources, leveraging of assets, and a greater positive impact on students, faculty, communities and society.
- Underlying Principles: Holistic definition of good health and wellbeing, intergenerational experiences, community-engaged partnerships, MSU's land grant mission and values for diversity, inclusivity, connectedness and its commitment to a safe and healthy campus and to enhancing student and faculty success.

An oft-asked question from administrators, including the provost, has been what separates AgeAlive from other university aging programs. It could be argued that each institution brings its own unique stamp and contributions to even familiar programming as a result of its institutional history, culture and geographic reach combined with the commitments and values it decides upon. AgeAlive at MSU is no exception. It possesses a singular combination of characteristics including its land and world-grant mission, a commitment

to including all disciplines and generations, engaging in community partnerships, and a holistic view of health and wellbeing. This unique combination has formed the basis of a distinct program that adds value to the national landscape of university-based aging programs.

More specifically, AgeAlive has begun to define its “pillars”; four focus areas of research and programming in which significant contributions to the field of aging can be made. In addition, two crosscutting goals have been identified that tie each of the pillars together: Connectivity and AFU designation. Connectivity refers to establishing an infrastructure and resources that will enable anyone interested in aging to connect with one another, exchange information, and foster synergistic partnerships. It includes resources such as the Aging Assets database, a communication hub, networking events, internship opportunities, and life-enrichment programs. AFU designation as a crosscutting goal means that all initiatives need to map directly to one of the 10 AFU criteria. The four pillars represent AgeAlive’s focus areas in which AFU principles are applied. These pillars include:

- Caregiving, whether it be delivered by paid home care workers or family caregivers,
- Alternate Retirement Pathways
- Intergenerational, educational programming to benefit both students and elders, and
- Life Enrichment: bringing life to life through the arts and humanities.

Figure 1 represents AgeAlive’s conceptual framework. Each of the pillars, then described in detail, illustrate how concrete discrete projects can fulfill the AFU promise and how other institutions can use this framework for their own focus areas.

<p>AgeAlive: for Lifelong Wellbeing and Quality of Life</p> <p><i>Vision:</i> A world in which there is respect, wellbeing and quality of life for all people of all ages and abilities.</p> <p><i>Mission:</i> Connect scholarship, programs and initiatives that share a common goal of increasing wellbeing and quality of life across the lifespan to achieve more efficient and effective use of resources, leveraging of assets, and a greater positive impact on students, faculty, communities and society.</p> <p><i>Principles/Values:</i> Holistic definition of good health and wellbeing, intergenerational experiences, community-engaged partnerships, University’s land grant mission and values for diversity, inclusivity, connectedness and its commitment to a safe and healthy campus and to enhancing student and faculty success.</p>			
<p>Cross Cutting Goals: Connectivity and an Age-Friendly University</p> <p>Four Priority Areas</p>			
<p style="text-align: center;"><u>Caregiving</u></p> <p><u>AgeAlive Initiatives</u></p> <p><u>Sample Partnerships</u></p> <p>I. IMPART Alliance: Building Training...Building Quality (BTBQ) Personal Care Aide (PCA) Training</p> <p>II. University WorkLife Office – Dependent Care Program</p> <p>III. Community home care agencies, Area Agencies on Aging, etc.</p>	<p style="text-align: center;"><u>Retirement Pathways</u></p> <p><u>AgeAlive Initiatives</u></p> <p>I. Representative on WorkLife Retirement Committee</p> <p>II. Retirement Education in partnership with others; open to community members</p> <p>III. Life Enrichment Programs related to retirement; open to community members</p> <p><u>Sample Partners</u></p> <p>I. WorkLife Office</p> <p>II. College of Education</p> <p>III. University Based Retirement Community (UBRC) Team</p> <p>IV. Community Centers, churches, etc.</p>	<p style="text-align: center;"><u>Intergenerational Experience</u></p> <p><u>AgeAlive Initiatives</u></p> <p>I. Intergenerational Education: Building an AFU for Student and Retiree Caregivers</p> <p>II. Event planning</p> <p>III. Student – Retiree Match program for counsel, mentoring, teaching [bi-directional benefits]</p> <p><u>Sample Partners</u></p> <p>I. Emeriti Association</p> <p>II. Retirees Association</p> <p>III. UBRC Team</p> <p>IV. Community partners</p> <p>V. Age-Friendly Community Planning Committees</p> <p>VI. Age-Friendly Universities</p>	<p style="text-align: center;"><u>Life Enrichment</u></p> <p><u>AgeAlive Initiatives</u></p> <p>I. Life Enrichment lecture and events series focused on learning, research, culture, and the arts; open to community members</p> <p>II. Faculty Wellbeing Program</p> <p><u>Sample Partners</u></p> <p>I. Alumni Association</p> <p>II. Retirees Association</p> <p>III. UBRC Team</p> <p>IV. Community Sr. Centers, churches, museums, art galleries, etc.</p> <p>V. Age-Friendly Community Planning Committees</p> <p>VI. Age-Friendly Universities</p>

Figure 1. AgeAlive conceptual model.

The caregiving pillar is building on an existing program at MSU called IMPART Alliance. IMPART was established in 2016 with support from the Michigan Health Endowment Fund to address a critical shortage of home care workers who are prepared to meet the rising need among older adults for long-term supports and services (PHI National, 2018). Its overall goal has been to advocate for the paid workforce but it is now expanding its mission to unpaid family caregivers. It is also teaming up with AgeAlive to share resources that support shared goals, including creating age-friendly environments that contribute to optimal quality of life. This partnership maps directly to key AFU principles such as ensuring that the university's research agenda is informed by the needs of an aging society and to ensure regular dialogue with organizations representing the interests of the aging population. Caregivers that provide hands-on assistance with activities of daily living such as bathing and dressing, instrumental activities such as shopping, cooking, and cleaning, and respite are essential. They enable people to remain in their own homes as long and as independently as possible and they are often in a pivotal position to determine critical client outcomes (Luz & Hanson, 2015a).

At IMPART's core is an evidence-based, comprehensive personal care aide training program titled Building Training...Building Quality (BTBQ). Studies based on BTBQ have provided evidence that such comprehensive training can lead to fewer costly adverse events such as falls and emergency department visits (Luz, Hanson, Hao, & Spurgeon, 2018). Yet, paid caregivers continue to work for exceptionally low wages, few if any benefits, lack of guaranteed hours and a lack of respect (Luz & Hanson, 2015b). Family caregivers often juggle caregiving of both elders and children or caregiving and work or school. It takes its toll on physical and mental wellbeing, income, job productivity, and family relationships. Both groups need training and support. These are economic and social realities of great magnitude and institutions of higher education that facilitate such programming not only contribute to addressing a national crisis but also reap benefits as they address the needs of their own faculty, staff and students.

The retirement pillar builds on Baldwin's work examining university initiatives to extend academic life and redefine retirement (Baldwin, 2018; Baldwin, Belin, & Say, 2018; Baldwin, Say, & Belin, 2018; Baldwin & Zeig, 2013). This pillar relates directly to several AFU principles including the promotion of personal and career development in the second half of life and engaging actively with the university's own retired community. As people live longer and healthier lives, the very concept of retirement is being debated. Many emeritus professors and retired university staff members wish to remain connected to their institutions beyond the "normal" retirement age, maintain relationships with students and colleagues, and continue contributing in some capacity. In the United States, a growing number of higher education institutions have developed a variety of methods to engage their "retired" colleagues in ways that benefit both the retirees and their institutions. This includes defining a range of alternative pathways into retirement that ease the transition to a new phase of life, crafting recall and consulting arrangements allowing retirees to return to work when needed, and creating retiree organizations that serve as a hub for keeping retirees connected and engaged with their former employing university through various social, educational, and service opportunities.

These emerging ways can extend academic life while retaining access to the valuable human resources that disappear under the old model where retirement means the end of

work and termination of a relationship with ones employing institution. The MSU WorkLife Office is now taking the lead on this issue by forming a new committee focused on Retirement Alternatives. The committee is comprised of representatives from key stakeholder groups concerned about retirement and efforts to reform traditional retirement approaches including AgeAlive, Human Resources, the WLO, the Academic Advancement Network (MSU's faculty and organizational development unit), and various colleges such as education, social science, and communications. They are tasked with developing a new, more flexible and individualized vision of retirement at the university and building support for making the university a more age-friendly institution.

The commitment to intergenerational relationships pillar will take many forms including a new program proposed by AgeAlive that addresses the AFU principle for intergenerational learning experiences that facilitate reciprocal sharing of expertise between learners of all ages. It also expands the caregiver pillar in that it recognizes that students as well as elders may be engaged in caregiving or concerned about care of family members. The program has several goals: 1) Identify concerns among both college students and retiree family caregivers related to aging, caregiving and intergenerational relationships, 2) Develop an intergenerational educational program focused on aging, dementia and caregiving, and 3) Pilot test the program to determine its impact on measurable student and retiree outcomes such as perceptions of aging, caregiver stress, anxiety, social inclusion and depression. This, in addition to the volunteer program, will help to increase student understanding of the longevity dividend and the increasing complexity and richness that aging brings to our society. Simultaneously, AgeAlive is examining ways in which to expand older adult education at MSU. It is inspired and will be guided by global examples (Findsen, 2017; Mark, 2018) of the opportunities universities have to provide not only intergenerational learning but also lifelong learning and life-enrichment experiences that embrace AFU principles and older adults as both recipients of and partners in learning.

The commitment to community-engaged partnerships pillar has led to working with local communities and the American Association of Retired Persons (AARP) on establishing Age-Friendly Communities, and Michigan as an Age-Friendly State. The criteria for AFUs and Age-Friendly Communities dovetail, providing opportunities for joint projects that satisfy both sets of criteria and are mutually beneficial. For example, the caregiving pillar aligns with age-friendly community goals for adequate housing and support services that allow people to "age in place". In the immediate future, AgeAlive plans to sponsor intergenerational university/community events that enhance wellness through the arts and culture. Long-range goals include real-world training labs for medical students, social workers, personal care aides; K-12 outreach such as high school technical training and positive aging programs for pre-school and young children; and quality of life programming such as lifelong learning.

To help achieve all of these goals, developing the volunteer and internship program cited earlier is crucial. The MSU WorkLife Office is supporting a part-time staff person to help set up the program and serve as Volunteer Coordinator. Eight student interns and volunteers are now enrolled to provide invaluable human resources while gaining critical educational experience that will advance their careers. They are assisting with a range of needed tasks consistent with setting up all necessary functions of an organization

including establishing databases, the website, and contact lists as well as researching and writing policy briefs, tracking legislation, creating a resource library, and helping to plan community events. In addition, MSU retirees have been recruited who are drawing on a lifetime of experience and skills and efforts are being made to pair students with retirees to work on joint projects so that both can help and learn from each other. It's an exciting time and this level of support will help make it possible for AgeAlive to continue to thrive and grow.

Evaluation

As AgeAlive takes shape and grows, the Board understands that evaluation is a key step in organization development to ensure that several organizational components critical to long-term growth and sustainability are strong and effective. The community and partnership building literature indicates a successful organization rests on developing a solid infrastructure with a clear vision, governance model, and partnership management policies early on. Key infrastructural components include sufficient staffing and a plan for adequate funding that can support staffing, operations, programming and goals. It is a common challenge for new organizations to build funding streams before having a clear mission, benefits and a proven record of accomplishment. The key word here is "proven". This requires evaluation data and metrics.

The board has therefore made a commitment to incorporating a robust evaluation component into all initiatives. To date, data have been collected as described earlier, through web searches, meeting minutes, field notes, and so forth. These data led to lessons learned and informed decision making and strategies taken. Going forward, AgeAlive is developing an evaluation plan based on program evaluation methods (CDC, 2012; Milstein & Wetterhall, 1999; Shackman, 2010) and a project-based approach to research methods for community change (Stoecker, 2005). These methods focus on program implementation as well as program effectiveness. They include process measures such as Board agendas, action plans, and indicators of successful Board functioning, based on the coalition, partnership, and management literature. They include performance measures such as tracking the number of meetings held, members in attendance, and number of volunteers and volunteer hours logged. Output measures, the tools for achieving AgeAlive's mission such as establishing an asset database, creating a communication network, e.g. website, listserv, networking events, and setting up a volunteer/internship program, will be tracked. Finally, program evaluation will include outcome measures to determine the impact of the overall program as well as its individual projects.

Specific measures for each of these evaluation components are now being identified as well as the data collection methods most appropriate to track each one. Traditional program evaluation includes both quantitative and qualitative data collection methods. Output measures may be as simple as determining if the Assets Database has been established, how many people are accessing it and so forth while outcome measures involve using methods such as key informant interviews, focus groups and surveys to determine user satisfaction or the impact of use on forming new partnerships. The database can facilitate gap analyses such that MSU will know not only its age-related

assets but also gaps that exist, the areas in which AFU principles still need to be expanded.

A useful tool in program evaluation is the logic model (List, 2006; McCawley, 1997), which will be used to guide program development, evaluation, and dissemination of findings for individual projects associated with AgeAlive. Detailed logic models specify a project's purpose, investments, activities, outputs, outcomes, and impact and can include how each will be measured. Engaging in good program evaluation is necessary in order to make good judgements about program activities, characteristics and outcomes to improve program effectiveness. All of the metrics collected will serve as the basis of an annual report and inform decision-making going forward. Without such evaluation, responsible growth and accountability are impossible. With it, it is possible to demonstrate the value of an AFU framework to students, staff, faculty, communities and society but also, importantly, to potential funders that can sustain AgeAlive.

Findings/lessons learned

AgeAlive's existence rests on the collective knowledge and expertise of a very passionate group of committed people who feel personally invested in its success. Early on, the committee was comprised of members who possessed a lot of "know-how" gained over decades of relevant experience such as organizational development and group process skills. They also had content expertise in areas such as the eldercare workforce and retirement alternatives, personal experience with aging and caregiving, and extensive professional networks on which to draw. Over time, the committee became intentional about how to round out membership with attention to needed talent, people who could be champions, its emerging mission and goals, and the value it places on being inter-generational and inclusive. For example, it knew it wanted AgeAlive to represent a University/Community-engaged partnership so intentionally recruited community members to serve on the Board. This strategy will continue to be applied as it aims for greater diversity.

In addition to understanding the critical importance of the Board composition, a number of lessons learned now guide the Board moving forward and may be of use to other institutions. They have been intentionally presented throughout this paper so that readers can use this paper as a guide to information (data) that needs to be collected at each step, analyzed for lessons learned (findings), and used to inform iterative decisions that build on each other. For example, early on, the AgeAlive committee collected data on the range of university-based, aging programs across the nation and used findings to develop a model unique to MSU. Every time members met with university administrators, they collected information on existing questions and concerns and subsequently modified the strategic plan in order to address these concerns. It has been an iterative cycle of data collection, analyses, and applying findings and lessons learned. Several of the key lessons include the following:

- Especially in large-scale organizations, change is slow. It is an iterative process that is not linear. It takes time and requires great patience.

- It is extremely process-oriented and requires an investment in building relationships and trust over time. It is not for people who want immediate action and outcomes, who cannot handle process with sensitivity.
- It also requires sensitivity to the motives and needs of multiple stakeholders and a genuine interest in finding common ground, making decisions based on consensus.
- Success involves understanding the bigger context, the history, ethos, culture, politics, values, and structure of the larger organization and having respect for the chain of command. Although AgeAlive is primarily a grassroots organization, it has always tried to work within the MSU system and its established mechanisms for change.
- Similarly, it is important to align the organization's values, mission and goals with that of the larger institution.

Circling back to the beginning of this case study, the program development and description sections were intended to provide a broad overview, a preliminary guide based on the MSU experience and the lessons learned along the way. To recap, in addition to the lessons listed above, the process involved:

- Establishing a clear vision, goals, deliverables and strategic plan. These guide all decisions.
- Reviewing the plan with multiple key leaders across the university and being willing to listen and respond to their concerns and questions. Modifying the plan to address these concerns and developing a list of frequently asked questions and key talking points,
- Identifying and cultivating champions,
- Finding a champion willing to take a leap of faith and give the organization wings,
- Maximizing opportunities that arise to legitimize the group's existence and make it part of the larger institutional structure, and
- Tending to evaluation, funding and sustainability.

Discussion

The MSU experience highlights challenges inherent in developing new programs in large-scale, research-intensive institutions. It requires persistence, forging relationships with key champions, a clear vision built by consensus, and ultimately someone to give it a chance by putting resources behind it. AgeAlive is still in its infancy and its sustained existence is not guaranteed. The initial committee may not have endured if years passed with no headway. However, it has been encouraged by progress within MSU and with community partners, and it has been energized by bearing witness to the great strides that the Age-Friendly Community and AFU movements have made in the past five years. Together, these advances continue to fuel the Board's continued passion and efforts.

Specific lessons learned from grassroots organizing at MSU have been presented throughout this paper. The data collected and the strategies taken based on their analyses and findings have been outlined in the program development and description sections such that the reader can follow the evolutionary process. It describes the iterative process, one in which information and data were collected, analyzed and used to make decisions

about “next best steps”. This approach is consistent with organizational development theory, which involves a continuous cycle of diagnoses, action planning, implementation and reassessment (Butterfoss, Kegler, & Francisco, 2008). It represents the nature of becoming an AFU in a large research intensive organization and some of the challenges that others can expect. It also allows the reader to learn from AgeAlive’s experiences and perhaps avoid, minimize and overcome such challenges. For example, it became clear that those who venture into grassroots organizing need to align their vision and efforts with the university’s priorities and frame the language in their strategic plan and promotional materials accordingly. In MSU’s case, it was important to highlight the value added and benefits of AgeAlive to students as well as other stakeholders. Organizations need to anticipate all of the questions and concerns that potential champions and administrators in their own institutions may express, respond to concerns and have key talking points ready to address each one.

This is not an example of top-down action to build a program at the institutional level, but recognition of top-level realities that shape and are critical to grass-roots success. This is what led to needed support for AgeAlive in the form of a staff position and a willingness to promote the idea to colleagues. It is one of the key components of successful organization and program development; engage stakeholders, assess, plan, act, evaluate, share lessons learned, and sustain, all the while building relationships and community, trust, and a commitment to the common goals. The hope is that, once established from the ground up, top-level support will help a program thrive and grow.

All of the lessons learned throughout this experience have potential application in other institutions whether they are seeking AFU designation or some other major goal. However, they also raise questions about other ways in which to approach this process. Are the challenges described in this case study unique to large-scale institutions with multiple administrative layers? Would a different approach have been possible or better? A fundamental research question is whether variations in institutional models, such as size, organizational structure, and culture, affect ability to develop new age-related programs? Is there an association between these variables and recommended methods? They undoubtedly have some impact. It is important for anyone wishing to advance new ideas or programs to explore other case examples, findings, and methods, determine the approach most suited to their institution’s characteristics, and maximize potential for success.

With each step, Michigan State University strengthens its stand on the importance of institutions of higher education to be relevant by responding to socio-demographic shifts and real-world issues that affect their students, graduates, staff, and faculty. Moreover, by doing so, they fulfill their obligation to contribute to society. Becoming age-friendly is not about meeting the needs of older adults; it benefits everyone, enriches all of us personally and collectively.

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