

## CHAPTER III

# Background and Context

Chapters I and II identified the need, the overall Project goals, and the rationale for an infusion approach to curricular and organizational change. This chapter provides background on the GeroRich Project application and selection process along with how the GeroRich Project is distinctive from prior gerontological social work curricular development initiatives. Values of inclusiveness and commitment to quality have consistently guided the work of the Coordinating Team and the national Advisory Board.

To understand the GeroRich Project's process and structure, certain aspects of its context need to be explicated.

1. The Hartford Geriatric Social Work Initiative (GSWI).
2. The relationship between GeroRich and the CSWE Strengthening Aging and Gerontology Education for Social Work (SAGE-SW) Project.
3. The primary activities for each year of the GeroRich Project.
4. The application and selection process characterized by inclusive outreach and high standards.
5. The importance of staff assistance and peer-to-peer problem-solving during the Planning Year.
6. The relationship between GeroRich and the current CSWE National Center for Gerontological Social Work Education (Gero-Ed Center).

After a concise overview of the programs comprising GSWI, each of these areas will be discussed briefly, because they were central to the success of the Project and the launching of growing national interest in gerontological social work education.

## 1. THE HARTFORD GSWI

In response to the demographic imperative and the need to increase the availability of social workers prepared to address the needs of older persons and their families, as identified in Chapters I and II, the John A. Hartford Foundation funds the GSWI, which has consisted of six different program initiatives:

- SAGE-SW: Based on a survey of practitioners and educators, this Project delineated 65 foundation competencies for gerontological social work

practice, conducted individual Faculty Development Institutes (FDIs) nationwide, and developed a blueprint for an approach to significantly enhance gerontological content into social work curriculum.

- GeroRich: funded 67 BSW and MSW programs nationally to infuse gerontological content into foundation courses.
- Building on the accomplishments of SAGE-SW and GeroRich, the CSWE National Gero-Ed Center aims to promote aging competencies at the BSW and MSW levels in order to prepare all social work students to work effectively with older adults and their families. Faculty and programmatic development are the primary methods used to infuse competency-based gerontological content in the foundation courses. Over 1000 faculty have participated in professional opportunities funded by the Gero-Ed Center.
- The Practicum Partnership Program (PPP) is an eight-year initiative that funds 60 MSW programs to educate over 1,000 specialized gerontological social workers by developing more aging-rich advanced practicum sites and supporting gerontological course work in the advanced year of the curriculum.
- The Hartford Geriatric Faculty Scholars Program and the Doctoral Fellows Program have provided career development opportunities by funding research in aging and health and mentoring to junior faculty and doctoral students. The Faculty Scholars program has funded 72 faculty researchers, and the Doctoral Fellows program has funded 43 doctoral fellows to date.

More information about the GSWI can be accessed at [www.gswi.org/index.html](http://www.gswi.org/index.html).

As a result of Hartford funding for geriatric social work, significant gains have been made over the past eight years in 1) increasing the number of faculty including gerontology in their foundation content and the number students prepared with foundation gerontological competencies, and 2) supporting gerontological research and career development of social work faculty and doctoral students. This chapter briefly describes how the GeroRich Project built on the faculty development framework of the SAGE-SW Project, and how the current Gero-Ed Center extends the reach of both prior projects through regional institutes, widespread dissemination of curricular resources, and efforts to influence educational policy.

## **2. BUILDING ON THE ACCOMPLISHMENTS OF SAGE-SW**

The successful CSWE SAGE-SW Project (funded 1998-2001) provided the foundation for the GeroRich Project. Both projects shared the common goal of creating sustainable aging-rich foundation curriculum changes, but their methods to do so

differed. The GeroRich Project focused on a process of planned change essential to programmatic and curriculum enhancement; the SAGE-SW Project emphasized individual faculty training and resources to infuse gerontology into the foundation curriculum. This reflected the GeroRich Project's underlying assumption that the training of faculty and dissemination of materials, exemplified by the SAGE-SW Project, must be coupled with curriculum and organizational change to achieve maximum long-term impact on gerontological social work education. GeroRich and SAGE-SW staff collaborated in numerous ways, including sponsoring joint sessions at the CSWE National Conference for Gerontological Social Work Education, offering a Faculty Development Institute specifically for GeroRich project directors, jointly disseminating teaching resources, editing a special section of the *Journal of Social Work Education* (Hooyman & Tompkins, 2005) titled "Innovations in Gerontological Social Work," and preparing joint contributions to a special issue on "Transforming Curriculum" of the *Journal of Gerontological Social Work* (Hooyman & St Peter, 2007).

### 3. GERORICH ACTIVITIES BY EACH YEAR OF FUNDING

Year 1 of the GeroRich Project was devoted to forming a National Advisory Board, disseminating the Request for Proposals (RFP), and providing assistance to applicants, with proposals due on November 16, 2001. Programs were informed of the selection decision and received \$30,000 on February 1, 2002, and were then expected to begin the planning process, which was condensed into 8 months for Year 1. Four regional workshops (West, Northeast, Midwest, and Southeast)—a day and a half in length—were held in spring 2002. The focus of the regional workshops was on the planning phase so that programs could be poised to begin implementation during the 2002-03 academic year. However, because of the short time allocated for planning (eight months), many projects were unable to implement changes until winter 2003.

The GeroRich projects director's Year 1 Progress Reports were reviewed by the National Advisory Board and the Coordinating Team to determine the continuation of funding (an additional \$30,000) in Year 2. In several instances, the Coordinating Team requested additional information from projects and met with project directors in the fall. The Planned Change Model phases of implementation, measuring outcomes, and developing strategies for sustainability were the focus of the regional workshops held in winter 2003. The GeroRich Web site was re-designed to be more user friendly, based on feedback from the Hartford Foundation Communications Consultant. The Coordinating Team also focused on marketing the GeroRich Project and Web site, and on ongoing dissemination of resources and lessons learned, including the monthly e-newsletter *The Dispatch*.

Year 3, an unfunded year for the individual projects, was devoted to data input

and analysis, sustainability, dissemination, including updating of the GeroRich Web site, and ongoing evaluation by the Coordinating Team. Both the Team and individual project directors also focused on sustainability and ways to institutionalize changes within each project's organizational culture. The Coordinating Team provided technical assistance during Year 3, continued to distribute the monthly e-newsletter, *The Dispatch*, periodically followed up with GeroRich project directors, and held a meeting open to all GeroRich project directors at the CSWE Annual Program Meeting, which included a resource fair highlighting project accomplishments and small group sessions focused on sustainability.

Because fewer projects (67) were funded than budgeted for (75), the Foundation approved the carry over of unallocated funds for Years 4 and 5 for two primary purposes: 1) ongoing technical assistance and opportunities for networking



among the GeroRich project directors at national conferences and 2) dissemination and evaluation. Along with the ongoing bi-annual and annual data submitted by GeroRich projects, the Coordinating Team also recruited nine GeroRich project directors and affiliated faculty to analyze the extensive database available at the beginning of Year 4. This additional two-year time period allowed the Coordinating Team to provide follow-up assistance with project directors, including assistance with publication, and contributed to directors' success in terms of disseminating findings, securing additional funding, and making time to participate in the evaluation in fall 2005.

#### **4. THE GERORICH APPLICATION AND SELECTION PROCESS: PROMOTING INCLUSIVE OUTREACH AND QUALITY**

The RFP, application, and selection process were characterized by what might initially appear to be competing values: 1) extensive outreach to ensure that all social work programs were informed of the opportunity to apply and 2) rigorous review criteria and performance expectations. Outreach strategies included widespread announcements of the new grant opportunity (including the RFP), and technical assistance for and consultation with interested programs. The criteria for selection and continuation of funding in the RFP were oriented toward ensuring quality.

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A critical and rapidly growing need exists for educational programs with enriched content in gerontology that will empower social workers to enhance the health and well being of older adults and their families... The Council on Social Work Education, with support from the John A. Hartford Foundation, announces a funding opportunity for as much as \$60,000 to prepare your students for the demographic changes of tomorrow. We want to support you in educating your students to become creators of the future for older adults.

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Request for Proposals, October 2001

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### **Extensive Dissemination of Program Announcements and RFP**

Numerous dissemination strategies were used to try to ensure that every social work program in the U.S. knew about the opportunity to apply for GeroRich funding. Postcards were mailed to over 700 individuals and organizations: National Association of Deans and Directors of Schools of Social Work (NADD), Association of Baccalaureate Social Work Program Directors (BPD), and Association for Gerontology Education in Social Work (AGE-SW), which is an individual membership organization. The postcard indicated the phone number to call for information and announced the RFP's availability.

Programs were alerted five months prior to the due date to enable them to start preparing a proposal. This occurred through posting the RFP on the GeroRich Web site and mailing it to individual programs as well as to the other Hartford-funded projects. Four months prior to the due date, emails were sent via the listservs for NADD, BPD, and AGE-SW members announcing the availability of the RFP followed by two reminder emails shortly before proposals were due. Feedback from applicants expressed appreciation for staff's outreach and dissemination efforts.

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*"I would never have believed that I could be successful at my first attempt at grant-writing. The staff's availability and helpfulness convinced me that I should give it a try—and my director and I were thrilled when we got funded."*

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### **Staff Technical Assistance and Consultation**

To implement the Coordinating Team's core value of inclusive outreach, the application process was characterized by continual staff availability to provide timely, effective, and enthusiastic customer-service to over 200 interested faculty members, often involving multiple contacts and follow up via phone calls and emails. The Project Coordinating Team was also available to meet with potential applicants at the 2001 annual meetings of the NADD, the BPD, and The Gerontological

Society of America (GSA). Presentations to deans and directors emphasized the importance of 1) the process of change involved in such a large curriculum enrichment project, and 2) the deans', directors', and faculty's "buy-in" to the curriculum change process to ensure sustainable change focused on all students' gerontological learning. At the BPD meeting, staff reviewed proposal drafts, providing feedback and written suggestions, and discussed the concepts of the process of change and the goals of sustainability and gerontological pervasiveness in relation to each program. In addition to informal consultation, staff presented at four separately scheduled presentations/meetings to approximately 180 BPD attendees.

The extent of academic administrators and faculty's support and enthusiasm for the infusion of gerontological social work exceeded initial expectations. This is even more noteworthy in light of all that was expected of applicants in terms of the written proposal and the match requirements. Because the RFP required extensive baseline information, completing the application was time consuming and labor-intensive for most programs. Throughout the application, planning, and implementation phases, the Coordinating Team experienced a groundswell of interest, enthusiasm, and commitment among BSW and MSW programs to create long-term, sustainable gerontological curriculum changes, particularly among programs that had never had an opportunity to apply for funding at this level. Overall, distribution of the RFP and the intensive, interactive application process itself produced widespread inter-program communication, community networking, and renewed interest in bringing gerontology to the forefront of social work education.

In addition, after the selection process was completed the GeroRich Coordinating Team reached out to unfunded programs by writing and phoning them about ways they might be helpful to them and suggesting other future funding sources along with ways to implement geriatric curriculum changes without full funding. Unfunded programs were also offered complimentary, individual, one-year memberships in the AGE-SW. Based on the GeroRich Advisory Board recommendations, a needs assessment letter was mailed in May 2002, asking about ways that the Coordinating Team could be helpful to unfunded applicants. Assistance in the form of the monthly *Dispatch*, listserv announcements, and dissemination of teaching resources was provided to nine unfunded programs in Years 1 and 2 of the GeroRich Project.

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One program director wrote a letter acknowledging staff outreach: *"Your letter of May 22, 2002, was so unusual, perhaps unique, as to merit a response. I have been in academia in two major universities and have raised a considerable amount of money through grants... I have also written several unfunded grant proposals, but I never received a 'condolence' letter like yours. But you asked and I will tell [how you can be of assistance]."*

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## Promoting Quality in Selected Projects

As noted above, the proposal components, the criteria for funding, and the requirements for continuation were clearly stated in the RFP. (Please see the Indicators of Success that were tied to the rating criteria in the Appendices.) Another indicator of the focus on quality was the thorough and rigorous review process undertaken. For the 103 proposals received, each was reviewed by a team of three: a GeroRich Advisory Board member, a “Hartford Mentor” from the Hartford Faculty Scholars program, and an “Applicant Reviewer.” Consideration was also given to ensuring an equal representation of program types (BSW, MSW, and joint) on each review team.

### **GeroRich Advisory Board Members:**

Mildred Joyner, MSW, LSW, West Chester University

Lenard Kaye, PhD, University of Maine

Nancy Kropf, PhD, University of Georgia

Michael Patchner, PhD, Indiana University

JoAnn Damron-Rodriguez, PhD, University of California Los Angeles

Nancy Wilson, MA, LMSW, Baylor College of Medicine

This review panel composition ensured diverse input from gerontological social work experts and the applicants’ peer group. Involving applicants as peer reviewers built upon expertise within social work programs, expanded applicants’ knowledge of proposal writing, and increased awareness of curriculum change strategies. Review groups were expected to reach consensus. When their recommendation was “unsure/maybe,” proposals were sent out for a second review by two additional Advisory Board members.

The focus on quality was further exemplified by the Board’s decision to fund only 67 highly competitive proposals, even though grant funding was available for 75 projects. Selection criteria were applied uniformly across all programs, regardless of size, location, or degree level. These criteria included the potential for sustainable changes and engagement of key stakeholders, evidence of curricular innovation and institutional commitment, and plans for measuring outcomes. At the same time, the goal of achieving a relatively balanced distribution of funded programs across degree level, location, and size influenced the final Board discussion on proposals to be funded.

Discussion of all proposals at an Advisory Board meeting focused on indicators of potential for success to identify clearly fundable proposals and then to determine which proposals in the “unsure” middle category might be fundable. Notably, all proposals submitted had *some* of the key elements for geriatric enrichment, and nearly all would have been fundable with some additional technical

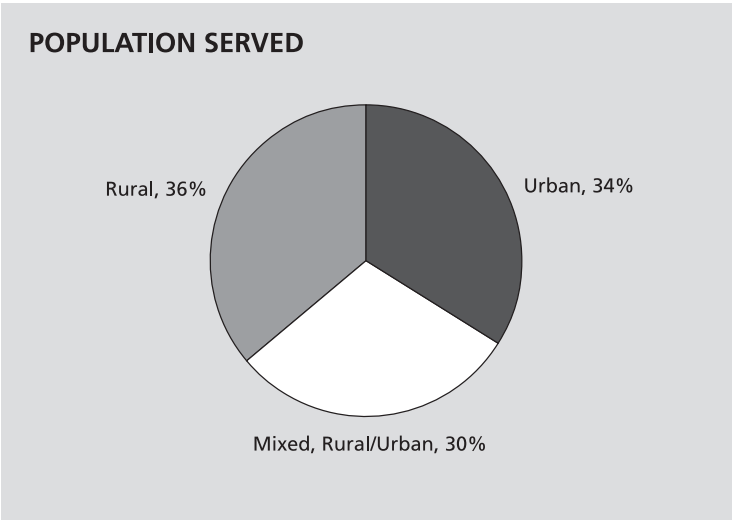
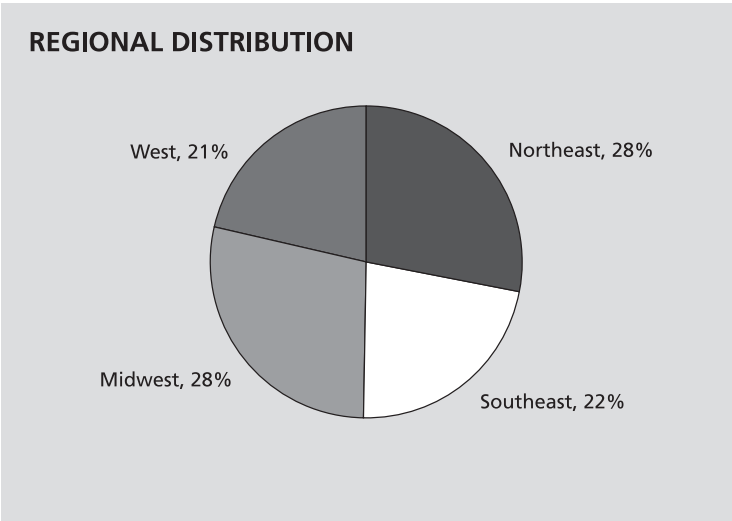
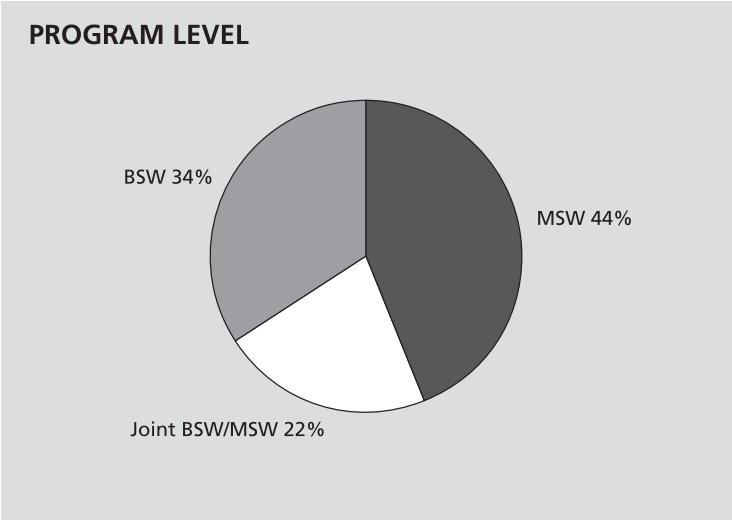
assistance. Even among the unfunded programs, the foundation was laid for potential change (e.g., faculty had become engaged in talking about gerontological social work, linkages had been built with practicum sites, and current curriculum had been assessed).

Successful proposals provided evidence of the following:

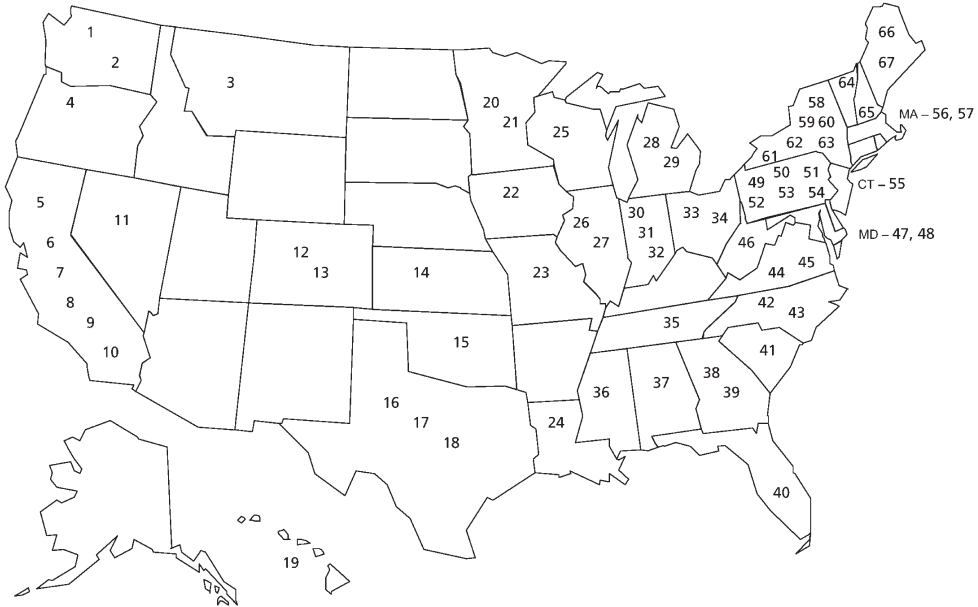
1. An awareness of and commitment to the process of planned change.
2. Evidence of the project director's leadership potential to be successful.
3. Feasible strategies to engage faculty in the decision-making process around ways to infuse gerontological content into curriculum and dissemination.
4. Ways to expose a majority of students to gerontological learning experiences through assessing students' interests and overcoming barriers to student involvement in learning opportunities.
5. Evidence of potential to sustain the curriculum changes after the funding cycle ended.
6. Congruence between the proposed plan and the programs' resources/infrastructure.
7. Administrative support and in-kind funding of at least \$10,000 per year.

The outcome of this careful review process was a distribution of funded programs by program level, location, and size as displayed below.





## 67 GERIATRIC ENRICHMENT IN SOCIAL WORK EDUCATION NATIONWIDE SOCIAL WORK PROGRAMS



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|---|---|
| 1. University of Washington                                 | 34. College of Mount St. Joseph               |
| 2. Eastern Washington University                            | 35. University of Tennessee                   |
| 3. University of Montana                                    | 36. University of North Carolina, Chapel Hill |
| 4. Portland State University                                | 37. University of Alabama                     |
| 5. California State Univ., Chico                            | 38. University of Georgia                     |
| 6. San José State University                                | 39. Georgia State University                  |
| 7. Azusa Pacific University                                 | 40. Barry University                          |
| 8. California State Univ., San Bernardino                   | 41. Winthrop University                       |
| 9. California State Univ., Los Angeles                      | 42. University of North Carolina, Chapel Hill |
| 10. California State Univ., Long Beach                      | 43. North Carolina State University           |
| 11. University of Nevada, Las Vegas                         | 44. George Mason University                   |
| 12. Colorado State University                               | 45. Howard University                         |
| 13. Metropolitan State College of Denver                    | 46. Marshall University                       |
| 14. University of Texas at Austin                           | 47. Hood College                              |
| 15. University of Oklahoma                                  | 48. Morgan State University                   |
| 16. University of North Texas                               | 49. California University of Pennsylvania     |
| 17. University of Texas, Austin                             | 50. Shippensburg University                   |
| 18. Baylor University                                       | 51. University of Pennsylvania                |
| 19. University of Hawaii                                    | 52. University of Pittsburgh                  |
| 20. College of St. Catherine & The University of St. Thomas | 53. West Chester University                   |
| 21. University of Minnesota                                 | 54. Widener University                        |
| 22. University of Iowa                                      | 55. Southern Connecticut State University     |
| 23. Saint Louis University                                  | 56. Boston College                            |
| 24. Northwestern State Univ., Louisiana                     | 57. Bridgewater State College                 |
| 25. University of Wisconsin, Green Bay                      | 58. Syracuse University                       |
| 26. University of Illinois at Chicago                       | 59. University at Albany                      |
| 27. Southern Illinois University                            | 60. Fordham University                        |
| 28. Michigan State University                               | 61. Lehman College                            |
| 29. Calvin College  | 62. State University of New York, Brockport   |
| 30. Ball State University                                   | 63. Long Island University, Brooklyn          |
| 31. Indiana University                                      | 64. University of Vermont                     |
| 32. University of Southern Indiana                          | 65. Plymouth State College                    |
| 33. Wright State University                                 | 66. University of New England                 |
|   | 67. University of Maine                       |

The Advisory Board and the Coordinating Team were pleased that the outreach and technical assistance efforts resulted in a diversity of funded programs. A list of the programs funded is provided in the Appendices.

Another indicator of quality was that all Year 1 progress reports were reviewed by Advisory Board members, who provided written feedback on progress to date, thus ensuring timely critique by gerontological experts. In addition, directors of participating programs submitted short renewal proposals for Year 2 funding. Exemplary projects at the end of the planning year were characterized by goals that were congruent with the program's mission and organizational culture; innovative and organizationally appropriate strategies to identify and engage faculty, students, and community stakeholders; attention given to sustainability; knowledge of how to access assistance needed to attain goals; and committed leadership.

## 5. THE IMPORTANCE OF STAFF ASSISTANCE AND PEER-TO-PEER PROBLEM-SOLVING IN THE PLANNING YEAR

During the Planning Year the GeroRich Coordinating Team carried out one-on-one consultation with project directors and others to ensure success. And importantly, project directors were brought together at four regional meetings to facilitate peer-consultative networking and information and resource sharing. Project directors were encouraged at these meetings to be candid about obstacles to change as well as to describe their accomplishments. One of the most important outcomes of the regional meetings was the in-person connection and sharing of ideas related to challenges and successes among project directors. At these meetings, directors from programs with similar characteristics (i.e., size, urban/rural, or program level) problem-solved in small groups regarding ways to address common challenges.

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One project director noted of the small group sessions...

*Enjoyed hearing other's ideas and learning of new resources. Great networking opportunity. Interesting how we all have common experiences.*

And another director commented...

*Good to learn from each other's successes and challenges. The opportunities for networking have been invaluable.*

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As a result, project directors left the regional meetings with specific ideas for the next phase of implementation. On-going networking and communication among project directors was facilitated by a "Geriatric ListServ" and a monthly newsletter, *The Dispatch*, which among other things provided news about program accomplishments (e.g., presentations, publications, or other successes) and curricular and teaching resources.

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*"The support that I have received from the GeroRich staff, through online communication, the GeroRich Dispatches, and their availability by phone and at project directors meetings, has been vital to our project's success."*

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## **6. THE RELATIONSHIP BETWEEN GERORICH AND THE CURRENT CSWE NATIONAL CENTER FOR GERONTOLOGICAL SOCIAL WORK EDUCATION (GERO-ED CENTER)**

The Gero-Ed Center, started with lead funding from the Hartford Foundation in 2004, builds on the accomplishments and lessons learned from the GeroRich Project. For example, many of the curricular and teaching resources available on the Gero-Ed Center Web site ([www.Gero-EdCenter.org](http://www.Gero-EdCenter.org)) were developed by GeroRich programs. In fact, a strength of the Web site is that the resources have been developed by faculty from the "bottom up," rather than by gerontological or curriculum experts. This means that such Web site resources have been effectively implemented in a GeroRich program and oftentimes refined based on faculty and student feedback.

The Gero-Ed Center continues the GeroRich emphasis on programmatic change, not just individual faculty development, and infusion of gerontological competencies, content, and teaching resources. Lessons learned and innovations developed by GeroRich project directors have been widely disseminated to participants in the Gero-Ed Center's regional Curriculum Development Institutes (CDIs), Gero-Ed one-day topical institutes, the national Gero-Ed Forum conference, the Gero-Ed Web site, and an eLearning course, *A Planned Change Model: Preparing Gerontologically Competent Graduates* (see the Gero-Ed Center Web site [www.Gero-EdCenter.org](http://www.Gero-EdCenter.org) for more information and access to the eLearning course).

In addition, 16 GeroRich project directors from programs that successfully infused gerontology now disseminate their expertise by serving as mentors to the nearly 160 faculty participating in the regional CDIs. In effect, the Gero-Ed Center is a primary mechanism for disseminating findings, building on lessons learned, and refining strategies from the GeroRich Project.

## **CONCLUSION**

The GeroRich Project was the largest curriculum and programmatic development initiative in gerontological social work education, building upon the prior accomplishments of SAGE-SW and setting the stage for the national Gero-Ed Center. Throughout the two years of funding to 67 programs and the three

unfunded years of evaluation, dissemination, and building sustainability, the Project was characterized by a commitment to outreach and quality. This commitment continues, with the Coordinating Team applying rigorous criteria before posting GeroRich materials on the current Gero-Ed Web site as well as providing opportunities for problem-solving and networking among the GeroRich project directors. The pride and enthusiasm with which project directors refer to their GeroRich experience is a vivid testimony of the difference made by their programs' receipt of GeroRich funds. In addition, project directors continue to draw upon the GeroRich Planned Change Model in their ongoing marketing, evaluation, resource development, and dissemination activities. The next two chapters describe each phase of the Planned Change Model that was developed by the GeroRich Project and has continued to be refined and implemented through the Gero-Ed Center.

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*"It was an honor to be a recipient of the GeroRich grant. Our School benefited dramatically. The faculty is more aware of the need to include material on older adults in the curriculum. I receive weekly calls from students for information on practica in agencies serving older adults, resources for academic and personal needs, and questions in regard to the interdisciplinary gerontology program. I have met colleagues from across the nation whom I am in contact with for resources. And I have had numerous opportunities to present on GeroRich at national conferences. Gerontology has become more visible on the campus, and I have been asked to facilitate development in the field as a direct result of my work on the grant. I am very pleased with what we have accomplished the past three years and the continual support and guidance of the GeroRich administrative team. Thank you!"*

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