CHAPTER VII

Programmatic Factors Associated with Project Success

All GeroRich projects were successful to some extent in attaining their goals. At one end of the continuum were projects that were able to infuse gerontological competencies into all or nearly all of their foundation courses. Most projects fell into a middle category of infusing gerontology into three or four foundation courses and typically modifying their goals based on lessons learned from implementing the first set of changes. Less than a handful were at the less successful end of the continuum, where infusion was limited to only one or two foundation courses, or where projects developed electives or required gerontology courses. Although such free-standing courses can enrich a program by providing more options for students interested in gerontological social work, this specialization approach was not considered to be a viable way to meet the GeroRich Project goals of gerontological pervasiveness and sustainability.

As noted in Chapter V on Implementation and Sustainability, the effectiveness of specific change strategies typically varied with a social work program's structure, organizational culture, and mission. Therefore, a "magic formula" to ensure and sustain gerontological competencies in curricula and program structure does not exist. However, factors that made a difference among projects' success and sustainability can be distilled as guidelines to other programs.

This chapter presents a distillation of those factors and closes with a case example of a highly successful social work program in terms of the GeroRich goals of gerontological pervasiveness and sustainability. While there is some repetition with prior lessons learned (what worked—and what didn't work), this chapter focuses on what was found to be effective and provides only a brief discussion of factors that hindered programmatic success.

Change Strategies that Fit Program Size, Organizational Culture and Structure, and Mission

Being Realistic and Strategic in Goal-Setting

Although the project directors' leadership and vision of curricular and organizational change were essential factors in their success, being targeted, persistent, realistic, and flexible about different strategies were often more important leadership qualities than vision per se.

One GeroRich project director commented that her colleagues were amazed at her perseverance, but she was not certain if they considered that to be a positive or negative trait! Nevertheless, her colleagues came to depend upon her for resources and one time became irritated when she was out of town and unable to provide the latest information about Medicare Part D.

These qualities were most often reflected in the types of change strategies developed and adapted. Although Sanders et al. (2006) reported that the overall change process did not vary significantly by program size, qualitative data suggested some variation by program size in specific strategies implemented to engage faculty and students. Large programs typically found it most realistic to develop multipronged or -tiered approaches that strategically sequenced infusion across targeted foundation courses. For example, some began with all sections of one or two foundation courses with the greatest potential for change, such as Human Behavior and the Social Environment (HBSE), rather than diffuse efforts across all foundation courses; in doing so, they built a framework for the future that would be applicable to other foundation courses more resistant to change. Other programs used a three-tiered approach: foundation content taken by all students; foundation courses with different sections (e.g., HBSE/practice course with sections focused on specific gero content areas), and electives. Strategic targeting also allowed programs to assess the effectiveness of their initial infusion strategies before moving to implement changes in other courses.

Not surprisingly, infusion often took longer than anticipated in large programs that had a range of degree options (part-time, evening, branch campuses, and distance learning or tele-courses), various course rotation cycles, and/or both degree levels (BSW and MSW). By contrast, smaller programs were better able to infuse all foundation courses and to engage all or most faculty. On the other hand, faculty members in small programs tended to carry heavier teaching loads, which limited their time to attend to curricular infusion and evaluation.

Organizational Culture

One of the primary organizational norms that affected project success was the extent to which a program was characterized by individualistic or collective values. Programs that valued individual faculty entrepreneurship and autonomy were less conducive to faculty working together as a group committed to curricular change than were those that had organizational norms that put the institutional "good" above individual interests. Smaller programs with missions distinctive to their geographic location and a high priority on teaching tended to have organizational environments that valued curricular development and fostered successful GeroRich projects.

Building Intersections with Program Mission and Other Substantive Areas

Effective infusion strategies and innovations were generally congruent with a program's mission and priorities such as a strengths-based approach, multi- or intergenerational practice and policy, life course or lifespan perspective, rural services, or multicultural practice. Mission-congruent strategies also took account of whether a program most valued teaching or research and of how to translate that value into curricular changes and research-focused initiatives. Another effective approach was to develop cross-cutting themes, such as multigenerational practice, that intersected with lifespan and cultural diversity issues, such as kinship care in child welfare. Faculty tended to be more receptive to such cross-cutting constructs than to issues of aging and older adults per se. In fact in some instances, the cross-cutting approach of intergenerational practice or social justice with historically disadvantaged populations across the lifespan was adopted for the program as a whole. In a handful of programs, faculty with substantive expertise other than aging utilized the GeroRich planned change approach to infuse content in other curricular areas.

Engagement of Stakeholders

Strategies to Obtain Faculty Engagement

Taking the time needed to obtain faculty buy-in (which was often longer than anticipated) was a primary factor associated with overall project success.

As noted by one project director, *"faculty development appears to have been the fulcrum around which all other efforts hinged."* Not surprisingly, crystallizing faculty interest in gerontological content was the most labor-intensive feature across projects (Wernet and Singleton, under review).

Regardless of the number and types of strategies employed, the faculty must own the curricular and organizational changes. Faculty buy-in was fostered by creating

win-win situations in which faculty who committed time to the curricular change initiative experienced benefits to their teaching and research. The benefits to faculty of participating in such change—more student FTEs, innovative curricular modules and case studies for teaching, new partnerships—must exceed the costs. Curricular materials tailored or individualized to enrich faculty's teaching interests and faculty development opportunities were two of the most effective ways to ensure such reciprocity. Both were found to be essential to overall project success.

Individualized Support: Tailored User-Friendly Curricular Materials

- Course-specific resource guides, resource libraries, and bibliographies.
- Information that is timely and relates to both personal and professional interests.
- Links to Web sites with teaching materials, including lecture notes, assignments, in-class exercises, and case studies, with explicit directions on how to use such resources effectively (e.g., guidelines for the case study analysis; questions for discussion).
- Course modules on specific gerontological topics (e.g., older women, gay and lesbian elders, cultural competence with elders) that can be infused into foundation courses or that cross-cut teaching concepts, such as multigenerational practice, social justice for historically disadvantaged populations, or grandparents as caregivers.
- Resources linking issues of aging and older adults to multicultural practice, cultural competence, and issues of diversity by race, gender, social class, sexual orientation, spirituality, and functional ability.
- Examples of how utilization of gerontological social work competencies can enrich teaching and be used to define and measure students' learning.
- Exemplars of gero-infused syllabi from other social work programs considered to be peer institutions.
- Mechanisms for faculty to provide feedback on the usefulness of aging-focused teaching materials.
- Flexibility of options used and resources developed, especially to address faculty turnover.

One project director noted, *"I have to work with whatever is available to me. If one approach failed or faltered, I needed to change strategies and try something different."*

Faculty Development Opportunities

- One-on-one interviews with faculty to assess their research and teaching interests and diverse teaching styles, and then tailor resources to support those differences.

- Use of incentives and rewards, such as a modest honoraria, release time from teaching, or public recognition for course modification.
- Participation in faculty development institutes or other training on issues of aging and older adults, support to take gerontology courses during the summer, or opportunities to "intern" in agencies serving older adults. However, it was important to provide further supports to faculty who were enthusiastic as a result of such participation when they returned to their "home institution" and faced other workload daily demands.
- Involvement in training or collegial discussions about effective pedagogical approaches to teaching gerontology (gerontology as pedagogy).
- Linkage of gerontology to faculty's research interests/opportunities, such as co-authoring a presentation at a gerontological conference or a manuscript for submission.
- Formation of a critical mass of gerontology faculty, either through faculty development or the hiring of more faculty with expertise and commitment to gerontology.
- Creation of faculty teams or work groups so that faculty members can distribute the workload associated with curricular change, support each others' efforts and problem-solve together.
- Development of new organizational structures, whether within the social work program or across programs within the region or home institution.

Both of these overall effective approaches—tailored teaching resources and faculty development—illustrate the single most important factor related to faculty engagement: the importance of taking the time to provide individual consultation and support to faculty members, regardless of program size, as they attempt to implement changes in what and how they teach in foundation courses. The engagement of faculty was increased when GeroRich project directors modeled how to use resources, asked faculty for feedback on materials, and provided feasible learning opportunities and resources that fit faculty's schedules and teaching strengths.

Building Community Partnerships

As with faculty, the most effective strategies ensured that both practitioners and the program experienced reciprocal benefits. The following factors were associated with effective community partnerships and overall success of the GeroRich projects.

- Creation of an advisory committee/task force on gerontological social work, which ideally is a mix of faculty, students, administrators, practitioners, field supervisors, and older adult consumers.
- Targeted opportunities for community input early in the curriculum analysis process, such as focus groups or brief surveys.
- Development of a multi-pronged experiential learning approach, such as providing service learning in addition to supervised field placements. Service learning is an effective way for undergraduate students to "test out" working with older adults before committing to a field placement. It reaches students "earlier in the pipeline" where they may be more open to thinking about working with elders.
- Trainings for agency-based field instructors, including those in non-aging settings. Many field supervisors, like most social workers, have not been systematically prepared with gerontological knowledge, skills, and values. Those who participated in such training tended to be effective role models and mentors for students regarding gerontological social work.
- Establishment of formal relationships with state, county, or city departments of aging can provide ongoing support such as student stipends, maintenance of a Web site, and field placement options.
- Engagement of retired MSW-level social workers as field supervisors.
- Development of continuing education offerings on issues of aging and older adults, where gerontological social workers were the instructors.

Promotion of Student Engagement

The programs identified as most successful had managed to engage students in GeroRich project activities (e.g., gero brownbag colloquia, conferences, a film series), although such engagement was not in itself essential to infusing gerontological content into foundation courses (see Chapter V on Implementation and Sustainability). The following factors were associated with student engagement and receptivity to working with older adults.

- Infusion of gero content into foundation classes and practicum (field) experiences to ensure that all students are exposed to aging issues and older adults before choosing their advanced practicum sites and subsequent career paths.
- Selection of field supervisors for foundation field sites that included consideration of their knowledge about older adults and their non-ageist attitudes.

- Required activities involving interactions with older adults in classroom or field settings. Generally this was the most important factor in increasing student interest, either through required assignments to interview elders, volunteer work/service learning, exposure to elders as class speakers, elders as simulated clients to act out scenarios for students videotaped interviewing assignments in practice classes, or foundation year placements within aging-focused sites. Across all programs, experiential activities with older adults—combined with opportunities to critically discuss such experiences—mattered the most in terms of influencing student attitudes and behaviors.

The effectiveness of opportunities to interact with elders are captured by the following comments from BSW students: *"I now feel comfortable starting a conversation with an older person….*
Somehow I had gotten the impression that older adults went into a nursing home and were doomed to die there. My volunteer work changed my perceptions…I have learned so much from this experience and forced myself into an area that I was least interested in."

- Quality supervision in placements—both gero and non-gero focused—that would provide students with marketable skills. Even students initially highly resistant to working with elders may be persuaded to try a site serving older adults if they know they will get the best possible field supervision.
- Development of activities that involved faculty, students, and field instructors, such as participating in the curriculum change team, creating an intergenerational project with elders and children, developing videos of elders as training tools, attending gerontological conferences or seminars, participating in lobbying related to aging issues, and sponsoring "focused conversations" on issues of aging and older adults.
- Formation of student interest groups or caucuses to help organize such activities as well as to request more gerontological content in their courses.
- Motivating students through public recognition (e.g., a special title such as GeroRich Fellow; stipends or awards for papers or research projects in gerontology, including research in their field agency).

Factors that Impede Success

Throughout this monograph, effective strategies conducive to success have been emphasized. However, identifying factors that challenged a program's ability to succeed in the primary GeroRich infusion goal can also be a useful for those seeking to understand the change process. These factors are presented within the context

that all GeroRich projects faced set backs across the three years and none were able to achieve all their goals identified in the planning year. Even projects that were considered most successful in terms of the common outcome measures and qualitative data experienced some of the factors noted below.

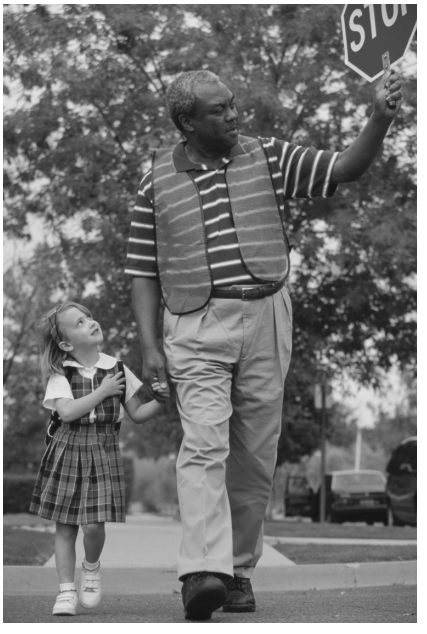
Overall, projects that had difficulty institutionalizing infusion of gero content in curricular and organizational structures tended to be characterized by the following factors:

- Inadequate time and attention given to the planning process, especially the curricular and organizational analyses. Faculty who were resistant to engaging in a careful planning process often presumed they already knew what needed to be accomplished and did not want to "waste" time in planning. Without careful planning, such programs moved too quickly to implement changes and lacked effective strategies to address obstacles.
- Faculty who entered into the curriculum change process with a fixed preconceived notion of what they wanted to do and were unable to alter that, even when they received conflicting feedback from colleagues, students, or field instructors that could have helped promote the change process.
- Programs that were unwilling to move beyond a specialization, elective, or minor approach to teaching gerontological social work. They failed to see the importance of infusion in foundation courses as a platform to launch more specialized gero content in future years.
- Faculty who were unable to articulate or build on the interconnections between aging and other substantive areas, fields of practice, and populations as a way to address colleagues' concerns about "adding one more thing."
- Faculty with gerontological expertise who insisted on "doing their own thing" or talked only to like-minded gero faculty rather than seeking collaboration with colleagues in other substantive areas.
- Programs with an organizational culture characterized by entrepreneurship, whether in terms of what faculty taught or obtaining research funding.
- Programs engaged in a reaffirmation self study. Although programs were mixed in their assessment of whether accreditation was a facilitator or barrier, overall, accreditation was found to be a barrier to creating and sustaining curricular innovations. This was the case because of the time demands of the self-study and a reluctance to make any changes before a site visit.

We close with a case study of a program that engaged in all phases of the Planned Change Model—planning, implementation, measurement, and sustainability—and that utilized effective strategies to engage stakeholder support and influence their

organizational structure. This represents a composite of factors from GeroRich projects, since no one project was able to utilize all the strategies presented here. We also recognize that without external funding, programs that seek to "gerontologize" their curriculum and organization will probably implement changes slowly and incrementally, compared to GeroRich projects. Nevertheless, we hope that this "model program" will encourage and facilitate others' curricular and organizational change initiatives.

A Case Study of a Successful Program



Professor Park served as the GeroRich project director in a joint BSW/MSW program in a Midwest public university of 12,000, with most of its students and alumni coming from nearby rural locations. It is a medium-sized program, with 20 faculty members, 125 MSW students, and 75 BSW students. At the time Professor Park applied for GeroRich funding, the program offered bi-annually one MSW elective, *Introduction to Social Gerontology*, with generally 8-10 students enrolled. There were no aging courses at the BSW level. The University Extension Office offered a certificate in gerontology for human service practitioners.

The Dean of this program wanted Professor Park to apply for GeroRich funding because she believed that both the BSW and MSW programs needed to be doing more to prepare students to work with older adults and their families. She charged Professor Park, a new assistant professor who had no gerontological training or practice experience, with finding ways to increase the number of students working with older adults and to develop more gerontological social work course content. Professor Park wrote the GeroRich proposal in his first semester as an assistant professor. While writing the proposal, he had taken advantage of the consultation available from the GeroRich Coordinating Team and was pleased that his first attempt at proposal writing had been successful. Notified on February 1, he had only begun to plan his next steps prior to the first regional meeting in March.

After the regional Midwest meeting, Professor Park became convinced that he must devote more time to planning and engaging faculty colleagues than he had anticipated when he wrote the proposal. He recognized that he had naively thought he could just tell faculty about the need for gerontological preparation

and changes would happen. Fortunately his Dean also recognized the importance of a careful planning process. At the regional meeting, Professor Park had learned that the first step in the planning process needed to be an analysis of the extent of gero competencies and content currently in his program's foundation courses. He also understood the need to determine the readiness of his organization to undergo a systematic process of planned change.

To determine the extent of gerontological content in foundation courses, Professor Park hired a work-study student to help him review course syllabi over the summer. He then emailed the lead instructors of all the foundation courses, informing them of his project, requesting a copy of their most recent syllabi, and asking their permission for the student and him to review the syllabi. Although personal meetings with faculty to convey this would have been ideal, very few faculty members were around during the summer. However, his email indicated his willingness to meet with faculty to answer any questions or concerns about the syllabi review. Since most faculty did not respond to his email, he followed up with phone calls.

After receiving permission from five of the six foundation lead instructors to review course syllabi, Professor Park and his student assistant generated a checklist of key terms to search for: aging, older adults, gerontology, intergenerational. He also utilized the network he began to build at the first regional meeting to contact a GeroRich project director in a nearby social work program to learn more about the gero terms that she was using in her curricular analysis. The student first used the checklist in her review of two course syllabi. Professor Park then reviewed her results to be sure the checklist was gathering the appropriate data before additional syllabi were analyzed.

Following the student's review of all the foundation syllabi, Professor Park summarized the findings, verifying that all feedback was anonymous and in aggregate form. He distributed a five-page summary document to all his faculty colleagues and his Dean. He also prepared a one-page document that highlighted the major gaps in the foundation courses. He planned to use this document in individual meetings with faculty colleagues in the fall when seeking their support for infusing gerontological content into their courses.

Gearing up for more data gathering in the fall semester, Professor Park asked his Dean for funds for refreshments for student focus groups, obtained the support of the Practice I instructors to implement a pre-test on gerontological competencies during the first class, and requested a chance to meet with his program's Practicum Advisory Council to obtain their input.

Through his curricular analysis, Professor Park found that the five foundation course syllabi had overall course objectives, but that very few had outcome measures. In addition, only two identified foundation social work competencies, and none had articulated gero social work competencies. Clearly, he needed to involve the appropriate course instructors in the process of selecting competencies in order to obtain their buy-in. Aiming to be realistic, he targeted the foundation Practice I and field

work courses first, because these instructors seemed most open to infusing gero content, and also because he would be teaching a practice section in the coming year.

The four Practice I instructors in this program typically meet a few weeks before the beginning of the fall semester to finalize their syllabi. These meetings also include the Director of Field since his program tries to ensure an integration of what students are learning in the classroom and their practicum site. Professor Park brought to this meeting a list of assessment competencies from the PPP Geriatric Social Work Competency Scale that seemed feasible to implement. He also brought some examples of gero-infused syllabi from other social work programs to illustrate the concept of infusion. After discussing the advantages of a competency-based approach, Professor Park asked his colleagues if they would be willing to select up to three competencies from the PPP list and showed them a template useful for selecting teaching content and resources for each competency. His colleagues were initially resistant because they had a lot of work to do before the semester started. When he assured them that such gerontological content and teaching resources were already available on the GeroRich Web site, they became more receptive and selected three assessment competencies that were congruent with the Practice I and foundation field course goals. In addition, the Director of Field agreed to work with field supervisors to provide opportunities for all students to interact with an older adult in their placement. Professor Park thanked these instructors and told them that he would bring to their next meeting some case studies, suggested readings, and other in-class exercises to support teaching these competencies. He followed up by contacting each practice instructor within a week, asking them about their progress and providing more teaching materials.

Professor Park's choosing to first work with the Practice I course instructors illustrates that curricular and organizational analyses often do not occur simultaneously, although that is the ideal. Engaging these instructors in the process of selecting the practice competencies was critical, even though he had not yet completed an organizational analysis of all key stakeholders for the overall infusion process. Instead, he drew upon what he, as a Practice I instructor, already knew about his program: who the key stakeholders were for the course and the importance of working through the decision-making unit of the relevant lead instructors and foundation faculty group.

As part of his organizational analyses, Professor Park next worked with his student assistant to review the extent to which gerontological issues were reflected in the programs' print and electronic materials. The student used a checklist that had been developed by the GeroRich Coordinating Team. This organizational analysis pinpointed a number of organizational structures to target but Professor Park decided to target 1) his program's library holdings, since up-to-date readings and audiovisual resources are essential to gero curricular infusion, and 2) recruitment and orientation materials received by all students. His rationale was based on the findings that the

program's small library included only two social gerontology texts published in 2000, one gerontological journal, and no videos or DVDs on aging, and its print materials did not even mention gerontological social work as a career option.

After identifying the faculty who served on an advisory committee to the librarian regarding the purchase of new library holdings, Professor Park requested a chance to meet with this committee. At this meeting, he presented a summary of current library holdings on older adults, a fact sheet on demographics, which made his case for the need for more library resources, and specific suggestions for how to improve the collection, such as his working with the librarian to determine and then order the most widely used gerontological social work texts and journals.

The next stakeholder identified was the Director of Admissions, who oversees the annual updating of recruitment and orientation materials. Professor Park met with him to present the results of the review of the program's print and electronic materials related to issues of aging and older adults. He offered to assist with the next revisions of these materials to provide more gerontological examples in order to increase the visibility of aging in their program's marketing materials.

Professor Park quickly learned that planned change is not a linear process and that there is often a gap between what colleagues agree to do and what actually happens. Even though the Practice I instructors had verbally agreed to infuse selected gero competencies into their classes and had shown Professor Park their revised syllabi, mid-way through the fall semester he learned from a group of students who were interested in gerontological social work that some sections of these two foundation areas had never mentioned aging or older adults. And although the field office staff had agreed to require interaction with an older adult in each foundation practicum, only a few placements had actually included such opportunities. Although discouraged by the lack of infusion, Professor Park was determined to develop an action plan to address these gaps between what was stated on the syllabi and what occurred in a class or field site. Before taking any other actions, however, he met with his Dean and made the case for some buy-out of his workload so that he could provide ongoing consultation and follow up to targeted instructors. The Dean agreed to remove him from any field liaison responsibilities

during this critical phase of beginning implementation.

Professor Park met with each of his faculty colleagues individually at the end of the fall semester. Because he did not want to appear critical of their efforts or teaching, he asked them a neutral question: "How well had the infusion of gero content worked?" He listened carefully to concerns expressed and conveyed more examples of how instructors could intersect aging issues with other content. He again provided them with tailored course materials and indicated that he would be sending email resource suggestions throughout the spring semester. He also offered to meet individually during the semester to discuss creative ways to facilitate the infusion, especially at critical points where the instructors were feeling "stuck."

Professor Park next convened a working group of eight field supervisors and asked them for suggestions about how to provide opportunities for students to interact with elders. The group was able to brainstorm ways that this could occur without requiring extensive additional time from field supervisors or students. Some of the field supervisors volunteered case study material for foundation classes and offered to co-present with the instructor the first time aging content was offered.

Professor Park sent handwritten notes of thanks to both the foundation classroom and field instructors who worked with him to make changes in what they taught. He contacted the instructors during the third week of the spring semester and was pleased to find that nearly all of them were actually teaching gerontological content. At the end of the semester, he met again to ask how well the infusion of gero content worked. He also obtained post-test measures on students' gero competency attainment and asked field instructors to rate student gero competency. He was pleased with the progress made and felt he had garnered the support of his Dean, several of his faculty colleagues, and a group of practicum instructors.

Although Professor Park had been thinking about issues of sustainability all year, the summer provided an opportunity for him to focus on how to institutionalize the changes made in the first year. He recognized the need to make his Dean and others aware of what he and his faculty colleagues had accomplished, even though as a new Assistant Professor he could not imagine "marketing himself" in this way. So, he asked the Dean to include an article about their successes in the program's newsletter, which is distributed to all alumni and potential donors, and to thank his colleagues at the first faculty meeting in the fall semester. His work with the library committee and with the revisions of his program's print materials continued over the summer as a way to institutionalize gerontological content. He also met with the Chair of the Curriculum Committee to begin a discussion about an annual review of gerontological content in the foundation courses. In anticipation of the fall semester, he reviewed the earlier curricular and organizational analyses to decide which foundation courses and structural arrangements he might target in the coming year. Last, he and his student assistant submitted an abstract for a paper presentation on their process of curricular and organizational analyses

and competency selection at a regional social work conference. He hoped to parlay this conference presentation into a publishable article by the end of Year 2.

Even though he was a new non-tenured faculty member, Professor Park accomplished a great deal in just one year. He set outcomes-based goals and measures; completed a comprehensive curricular and organizational analyses of gerontological content; obtained the support of faculty colleagues to infuse competencies and supporting content and teaching resources into the foundation practice courses; worked with the library committee to order more gerontology books and DVDs; obtained the Admissions Director's agreement to include aging in print and electronic recruitment and orientation materials; and took steps toward sustaining such changes. This process was not without setbacks, in particular learning from students that the practice and field instructors were not teaching the gero content noted on their syllabi. And as a new Assistant Professor, he occasionally felt overwhelmed by all that he had to do—alongside the pressure to publish. He discovered that when he presented his well prepared rationale for more time and student assistance to his Dean, she readily saw the need. Through this year-long process, he got to know both faculty and students better and began feeling that he was making a significant difference in students' education.