CHAPTER IV

# The GeroRich Planned Change Model: Identifying Needs and Planning for Infusion

The next two chapters describe the primary components of the GeroRich Planned Change Model, which is the essence of the Project, and identify lessons learned specific to each phase of the change process. Both chapters are organized in terms of the four phases of planned change, so that salient sections can be easily referred to as a program moves through the planned change process. Chapter IV focuses on the planning and evaluation phases, Chapter V on Implementation and Sustainability.

This following issues are addressed in the planning phase:

- Determining the need through analyses of the extent to which gerontology is embedded within a program's curricular and organizational structure.
- Engaging faculty, practitioners, and students in providing input regarding gerontological curricular and programmatic needs.
- Translating curricular data into outcome-based goals.
- Selecting gerontological social work competencies.
- Understanding the sources of support and resistance within key structural arrangements and stakeholder groups within a social work program.
- Translating organizational data into outcome-based goals.
- Selecting outcome measures.

As noted in Chapter II, a fundamental assumption of the GeroRich Project was that infusion *per se* could not occur without *strategic planning*. As a result, the intentional and strategic nature of each element of the planning phase was emphasized by the GeroRich Coordinating Team. Careful deliberate planning during the first year of funding was viewed as essential to increase the effectiveness of the implementation process necessary to achieve the dual goals of gerontological pervasiveness and sustainability of curricular and organizational changes made.

## The Planning Phase

### Determining Need through Curricular Analysis

The planning phase began with documenting the need for change within each social work program through both curricular and organizational analyses.

Typically, curricular analyses preceded organizational assessments, but sometimes both types of analyses occurred simultaneously, which is the ideal approach.

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One project director articulated the planning phase as follows: *"Planning year efforts were aimed at examining the extent to which gerontological content existed in various curriculum domains, in our community, and the commitment of key stakeholders to expand and increase content. The planning team determined that by involving many people from various constituencies we could ensure that we had broad representation of ideas (pervasiveness) and that many stakeholders could be engaged in the success of the project (sustainability). We were also looking to add content throughout the curriculum (pervasiveness) and to do enough curriculum development that the content could be easily added (sustainability)."*

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Analysis of a curriculum provides data regarding the extent to which gerontological competencies and content are already addressed in both the classroom and the field—and conversely, identifies gaps in gerontological content. A careful curricular analysis thus becomes the basis for deciding which foundation content to target first and for later evaluating the impact of changes made. Conducting a curricular analysis is also conducive to ongoing curriculum renewal inherent in the CSWE's reaccreditation standards and processes. This curricular analysis format can also be used by programs that do not organize foundation content in the course configuration defined by GeroRich. Although the GeroRich Project focused on assessing the extent of gerontological content in foundation curriculum, similar types of analyses could be conducted on other required courses and electives within specializations and concentrations.

Most GeroRich projects began by analyzing course syllabi to determine the extent to which issues of aging and older adults were visibly addressed. The two primary methods of syllabi analysis used were a course audit and content analysis of foundation courses. Course audits involved reviewing foundation course syllabi to identify gerontological competencies, content, and teaching resources within each course. Content analyses of foundation course syllabi involved identifying key words (e.g., age, aging, lifespan, life course, and intergenerational or multigenerational issues). With qualitative analysis software and the word search function on computers, content analyses of electronic copies of course syllabi can occur relatively quickly. In most instances, such analyses were completed by the GeroRich project directors and/or student assistants. However, faculty awareness of the need and their buy-in to the process was enhanced in programs where faculty colleagues were involved in these reviews. Examples of forms for both course audits and content analyses are in the Appendices.

*"The project team was not surprised to find that most syllabi had no or very little content related to older adults… Not surprisingly, faculty with experience and interest in aging had already incorporated content and materials in their courses."*

Although syllabi analyses provide useful data, what is stated on a syllabus or class outline may not reflect where or how aging competencies and content are actually taught—what really goes on in the classroom. To learn more about the extent to which issues of age and aging actually manifest in the classroom, input from faculty, students, and practitioners is critical. Over time, most GeroRich projects implemented a multifaceted curricular analysis approach. In other words, they combined reviews of syllabi with creating opportunities for input from students, faculty, practitioners, and in some instances elders through focus groups, surveys, and small group or individual meetings. Some strategies found to be effective for obtaining input from these constituencies are briefly described.

## Strategies for Obtaining Faculty Input on Curricular Needs

The primary means for obtaining faculty feedback on the extent of and need for increasing gerontological content were formal meetings, focus groups, written or electronic surveys, and one-on-one interviews. Although GeroRich projects utilized all these mechanisms, the types of strategies appropriate for obtaining faculty input and support varied with program size. For example, a faculty meeting can be an effective way to gather information in a small BSW program, but less so in a large joint-degree program where open discussions in faculty meetings may be difficult.

*"We built time into each faculty meeting where we could report on the project, resources available, and ideas for infusion. A sign of the progress we were making was that when GeroRich was not on our faculty meeting agenda one week, my colleagues asked why I was not reporting!"*

For larger programs, meetings of lead instructors for foundation courses, curriculum decision-making groups, and focus groups tended to be more effective ways to gather data on curricular needs than attempting to involve all faculty in a discussion. Written surveys of faculty were sometimes used to determine the extent to which aging issues were covered in their courses. However, such surveys tend to have a low response rate because of their time-consuming nature and because of the number of surveys faculty are typically asked to complete. One-on-one interviews with faculty, including faculty field instructors, may provide the most valid in-depth information about curricular needs, since responses can be probed and questions responded to. The time-consuming nature of interviews meant in most cases limiting interviews to key faculty, such as a program's opinion leaders who could then influence others.

*"One-on-one consultation has helped me to learn more about my colleagues' teaching and research interests, to find out more about what they are currently teaching related to aging (I learned not to make assumptions about whether they addressed aging in their teaching) and to stimulate ideas."*

Examples of questions that can be used in focus groups, written surveys, and one-on-one interviews along with suggested references for how to conduct focus groups with faculty are available in the Appendices.

**SAMPLE QUESTIONS FOR FACULTY**

**Discussion**

What is our program already doing to prepare our graduates to be gerontologically competent?

What major strengths do you perceive our program has that support the infusion of gerontological content into our foundation curriculum?

**Focus Groups**

Where could gerontological content be embedded in the courses that you teach to enhance the current course material?

What ideas might you have for linking issues of aging and older adults with other content areas in your courses?

What are potential barriers to infusing gerontological content into your courses? The foundation curriculum generally?

**Written Survey**

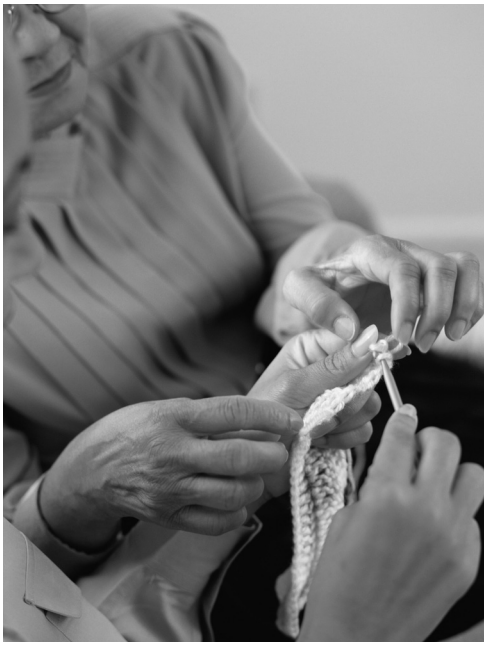
If issues of aging and older adults are not part of the courses that you teach, please list the difficulties or problems you would face in trying to do so.

**One-on-One Faculty Interview**

I am interested in learning what content areas are most important to you when you teach X foundation course? What social work competencies do you hope your students have acquired by the end of the course?

## Strategies for Obtaining Student Input Regarding Curriculum Needs

Students' input complements syllabus analysis and faculty feedback. Students can provide candid feedback on how well their field and classroom experiences are actually preparing them to work with older adults and their families, in other words, what happens in the classroom or field that is not reflected on the syllabus.



The primary methods for soliciting student input used by GeroRich projects were focus groups, written or online surveys, pre- and post-tests, gero content tracking, and involvement of students on a GeroRich advisory board or action team.

### *Student Focus Groups*

GeroRich projects typically convened groups of eight to ten students in order to ask them two or three questions regarding the extent to which issues of aging and older adults were addressed in their classes and field experience. The focus-group format yielded rich data, largely because it allows for probes of responses. Some projects reported that incentives, such as food, bolstered student participation. Examples of questions asked in student focus groups are in the Appendices.

### *Student Surveys and Pre-/Post-Tests*

Another useful method to obtain student feedback was conducting student surveys that asked about their experiences with gerontological content in foundation courses. Since students were most likely to complete surveys that were distributed as part of a required course, GeroRich projects often asked instructors, including adjunct faculty, to distribute surveys in their courses. Surveys through which students evaluate the extent to which issues of aging and older adults are covered in foundation courses are best distributed at the completion of the course. This contrasts with surveys in which students assess their gero competencies at both the beginning and end of the foundation year. Surveys to determine students' level of gero competencies are discussed further under the measurement phase of the Planned Change Model. When in-class surveys were not possible, the response rate to surveys placed in student mail files or distributed via email outside of a class setting was increased when GeroRich projects provided modest incentives (e.g., a random drawing among respondents for a coffee gift card, a sweatshirt, or a coffee mug with their program's logo).

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*Student surveys had some unexpected benefits. In addition to providing information to the faculty about student competencies and interest, they are an effective way of introducing students to the field of aging as a career opportunity.*

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### *Diary for Gero Content Tracking*

A diary format is another way that students assisted with keeping track of how frequently issues related to aging and older adults were mentioned in classes. Students were asked to make notations on a form each time issues of aging and older adults were mentioned in a classroom or field site. An example of this format is included in the Appendices. Because keeping an up-to-date diary is a time-consuming approach for students, it was most successful among students who were already committed to gerontological social work and shared the infusion goals of the project.

**SAMPLE QUESTIONS FOR STUDENTS**

**Focus Groups**

Reflecting on the courses you have taken thus far, do you recall any courses that included content on issues of aging and older adults?

If so, can you provide some examples of this content and the course in which it was presented?

Have you ever had any opportunities to interact with older adults in your field placement?

If so, please describe the opportunity. How did you react? Did this interaction increase your interest in thinking about working with older adults—or discourage you?

**Written Survey**

Based on your knowledge of foundation courses, including practicum, what suggestions for changes would you make to increase your competency in working with older adults in your chosen practice area?

When you think about your future career, regardless of the practice arena in which you want to work, how important do you think knowledge about older adults will be to your practice?

**Gero-Content Diary**

During the class today, to what extent were the following topics [e.g., theories of aging, aging services] concerning older adults discussed? Please check a choice that best indicates your observation. If any of the following issues were discussed, what were they? Please write the topics discussed in the space provided under each issue.

### *Student Participation on Advisory Structures*

Some GeroRich projects involved students in advisory boards or teams that were developed explicitly to "gerontologize" the curriculum and organizational culture

and that included both faculty and field supervisors. Students typically valued such opportunities to be involved with practitioners and faculty in identifying curricular and organizational needs. This process often increased both their awareness of and commitment to gerontological social work. Such involvement also served professional development purposes for students who were able to network with gerontological social work practitioners.

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One program even offered placement opportunities with its GeroRich project. *"The GeroRich Learning Team has become a highly sought after placement experience. Students on the Team became bonded and highly enthusiastic during the course of their learning. They have become the spokespeople who share their zest for gerontological practice with their fellow classmates elsewhere in the social work program."*

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The mechanisms selected for obtaining input on curricular gaps were most effective when they were congruent with a program's organizational norms and culture (e.g., whether a program routinely seeks student or practitioner input into the curriculum, which relates to the extent to which faculty members see the curriculum as solely their domain). In programs where faculty members believed that they should make all curricular decisions, obtaining feedback from students was difficult. With any of these methods to solicit student input, GeroRich project directors first informed faculty colleagues and secured their support in encouraging students to respond to the needs assessment or to participate in special events focused on gerontological social work. Doing so helped create conditions in which faculty were more likely to buy-in to and be supportive of the curricular change process.

## Strategies for Obtaining Practitioner Feedback on Curriculum Needs

Nearly all GeroRich projects sought practitioners' input, because of the benefits from bringing their rich practice experience and current knowledge of the field to bear on analyses of curricular needs. As such, community stakeholders help to anchor the social work curriculum in "real life." They are vital sources of data about practice trends, pressing issues in the field, and the competencies needed by graduates to work effectively with elders and their families. Community stakeholders are also a source of gero field placements for students and of employment with older adults for graduates. Similar to gathering information from faculty and students, focus groups and surveys were used to obtain practitioners' input regarding opportunities for students to work with older adults and their families in their agencies, barriers to such opportunities, and their ideas about ways that they might assist with the preparation of gerontologically competent graduates as

a guest lecturer, advisory board member, or presenter at career fairs In addition, the majority of GeroRich projects established some type of advisory structure—a board, task force, or team—that involved practitioners.

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*"Twelve social workers—both BSWs and MSWs—composed our Hartford Social Work Community Advisory Board. Members of this board have given invaluable advice and support for the School's curriculum infusion efforts and want to remain active after the grant ends. Thus we can continue to count on the judgment and expertise of these professionals with many years of experience serving older adults."*

In another program, *"…our advisory council has met two to three times per year and wants to continue. Members indicate that the council itself is one benefit of GeroRich. They relished the opportunity to meet with others who were committed to services and programs for older adults and to encourage students to consider a career in gerontology."*

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Examples of survey and interview questions for community practitioners are included in the Appendices.

**SAMPLE QUESTIONS FOR PRACTITIONERS**

**Interviews**

Thinking back to your learning experiences in social work school, including field placements, what was helpful/not helpful in preparing you for work with elders?

What values will be required for students working with older adults and their families in geriatric or non-geriatric settings? How can students gain these values?

What specific knowledge and skills will students working with older adults and their families in geriatric or non-geriatric settings need to be effective?

**Written Survey**

What type(s) of practice experiences do you feel are important in preparing students for a career in geriatric social work?

Thinking back over the students you've supervised in the last three years, what have been their major challenges in working with older adults?

Have you or someone in the agency developed any teaching or training materials about work with older adults?

## Strategies for Obtaining Input from Older Adults

Only a few GeroRich projects sought input directly from older adults, asking them about their experiences with social workers along with what knowledge, skills, and

values they thought social workers needed. Retired faculty and practitioners were often willing to participate in focus groups or surveys.

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*"Our faculty held a dialogue with a group of Social Work Pioneers to discuss the status of social work and gerontological social work education. This dialogue was enriching for all who participated, and our faculty has asked that we institutionalize this as a yearly event."*

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Most programs invited older adults as panelists or guest speakers for classes or special colloquia. A handful of programs used project funds to pay elders to participate in simulations of interviews with an older client.

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*In a BSW program, "…two veteran septuagenarian social workers, who remain active in the field, interact with students through guest lectures and participation in regional professional conferences and social events. They are invaluable resources to students, both because of their knowledge and experience as well as their ability to model successful aging."*

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Overall, input from elders into curricular needs was generally secondary to that from faculty, students, and practitioners, who were defined as the key stakeholders essential for change to be sustained. The voices of older adults were most often heard as sharing life experiences, including those with social workers, rather than providing feedback on the gerontological preparation of graduates.

### Translating Curriculum Analysis Data into Curriculum Change Goals

The next phase of the planning process was the development of outcome-based goals and measures. The curricular analyses provided the groundwork for goal-setting for classes and field work. Outcome-based goals clarify explicitly what a program considers to indicate successful curriculum change and serve as the benchmark for determining when the program has reached where it wanted to be. In developing such goals, GeroRich project directors were encouraged to first conceptualize their vision. What would the curriculum look like after the completion of the planned change process? Curricular outcome-based goals were derived from this vision, as well as a social work program's overall mission and goals, and dictated where programs were headed and where programs wanted to be at the end of the change process. Developing curricular outcome-based goals that were distinct from activities or actions—such as "we will infuse aging content into all our courses"—was challenging for most programs. This was partially because it is easy to jump directly to listing actions to take without being clear about desired outcomes. Yet outcome-based goals are the foundation for determining action steps.

The following example illustrates primary outcome-based goals along with supporting course-specific goals.

Primary Goal: Gerontological competencies will be infused in BSW foundation courses in Practice, Social Policy, and Human Behavior and the Social Environment by the end of the academic year. In response to our program's multicultural mission, gerontological competencies applicable to work with diverse populations will also be infused in these three BSW content areas.

Supporting course-specific goals:

- At least two competencies will be reflected in the course objectives of the syllabi for each of these foundation classes.
  - For example, all students who complete the Practice I course will know how to conduct an assessment with an older adult.
- Content on different gerontological issues and interventions will support attainment of the selected competencies in each BSW course.
- Teaching methods (e.g., case studies, role-plays, and at least three required readings) will support students' mastery of the gerontological content related to each of the competencies.

An analysis of structural factors in social work programs that can support or impede organizational change provided the framework for setting organizational change goals. GeroRich projects also used a Curriculum Change Framework (included in the Appendices ) to set goals and action steps.

## Organizational Analysis

The goal of gero organizational change is to embed and sustain gero competencies and the use of non-ageist language throughout a program, not just in course syllabi. The purpose of an organizational analysis is two-fold: to determine the extent to which issues of aging and older adults are institutionalized in a social work program (e.g., assessment of need) and to identify structural factors that affect a program's readiness to change by acting as supports or obstacles to infusion of issues of aging and older adults throughout a program.

An organizational analysis helps move a program's planned change process beyond the work of an individual faculty member to programmatic changes that are sustained by organizational commitment. Overall, GeroRich projects found that the information obtained from organizational analysis was useful to assess the extent of their program's need for organizational change, to identify structural sources of resistance and support, to develop realistic organizational goals and strategies, and to increase the likelihood that curricular and organizational changes would be adopted and sustained by faculty and academic administrators.

### *Determining Programmatic Needs*

Organizational analysis helps determine the types of changes needed as well as programmatic readiness for change. Programmatic needs can be identified by assessing the extent to which gerontology is institutionalized and embedded in a social work program. GeroRich projects determined whether and how effectively issues of aging and older adults were reflected in the following programmatic areas: the program's mission statement, departmental policies, and governance documents; print and electronic materials (description of mission and goals in course catalogues, recruitment brochures, orientation handouts, Web sites, articles in a program's newsletters or alumni magazine); library and AV holdings; artwork and other representations in the building (e.g., bulletin boards, posters, book displays); formal events (e.g., student recruitment sessions, orientations, annual lectures); and faculty recruitment priorities and fund-raising initiatives (development brochures, case statements, proposals to potential donors). Guidelines for determining such organizational needs are in the Appendices.

After identifying gaps and determining the need for programmatic change, GeroRich projects examined structural factors that were barriers or supports for change in their programs The two primary types of factors analyzed by GeroRich projects were *structural arrangements,* such as how curriculum decisions are made in a program, and *key stakeholders,* i.e., who may support or resist gero curricular infusion.

### *Analysis of Structural Arrangements in Social Work Programs*

Structural arrangements encompass governance and decision-making policies and procedures (e.g., how decisions about course content are made, implemented, and monitored), program autonomy within the university or college, the extent to which academic administrators are involved in curricular decisions, fiscal and in-kind resources (e.g., time, supplies, space), location of programs (such as branch or satellite campuses), evening or extended degree, types of faculty appointments including adjuncts and part-time faculty, and other programmatic demands (such as promotion and tenure reviews, a reaffirmation self-study, or central administration expectations for strategic planning).

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One program noted that a structural barrier was not only the fact that adjunct faculty infrequently came to campus, *"…but that our University is located in three locations within the state, each separated from the others by three to six hours of driving."*

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GeroRich projects found it useful to examine the extent to which decision-making and governance structures already attended to gerontological issues. This included determining whether formal community-academic partnerships (an advisory board, focus groups, or task force) existed to obtain input from gerontological social workers; whether the field office offered gerontological training to agency-based field/practicum instructors who either have no prior gerontological education or want to update their gerontological knowledge and skills; and whether a continuing education office provided workshops or in-service training on gerontological issues. The *Structural Supports and Barriers Identification Checklist*, included in Appendices, can be a useful guideline for analyzing such structural arrangements.

### *Analysis of Sources of Stakeholder Support and Resistance*

The other critical structural factor in an organizational analysis is the attitude of key stakeholders, i.e., those identified under the curricular analysis section, who have the capability to influence the success and sustainability of gero curricular and organizational changes. Stakeholder groups need to be recognized and appreciated in terms of their significance and importance to implementing and sustaining curricular and organizational change. This chapter discusses ways to identify and understand stakeholder support and resistance, whereas Chapter V presents strategies to overcome obstacles and effectively engage such constituencies.

#### Understanding faculty support and resistance to change

Identifying the extent of faculty support for and resistance to gerontological curricular and organization change typically becomes the first priority in an organizational analysis of stakeholders. Although support from all stakeholder groups is ideal,

change will not occur and will not succeed without faculty buy-in and ownership. As noted by one GeroRich project director, "You really cannot get anywhere without faculty buy-in." In order for planned change initiatives to be successful, faculty need to have a sense of ownership of the change process and outcomes and to perceive how gerontological infusion benefits them. Many GeroRich projects found that faculty members could be supportive in the abstract ("This is a great idea!") and yet not have the time or interest to do the extra work entailed by the infusion of gerontological competencies and content.

Identifying and understanding reasons behind faculty resistance to gero curricular and organizational change was found to be essential. The most common sources of resistance encountered by GeroRich projects were:

- Limited faculty time, which was perhaps the greatest barrier
- Limited curricular space
- Ageism
- Norms of academic freedom.

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One faculty member, who was a caregiver to his older parents, stated early in a GeroRich project that he would not change his syllabi because he was not going to respond to special interest groups, like older adults. The GeroRich project director was persistent in meeting individually with him, as well as providing him with resources for dealing with his parents' illness; two years later, this faculty member was one of the strongest supporters of the project.

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By nature of their academic positions, faculty members are always busy. In academic environments, there is always more work to do—more students to meet with, articles to write, courses to teach, journals to read—than there are hours in the day. In addition, demands on faculty time are often conflicting. For instance, junior faculty members face promotion and tenure pressures, especially in terms of scholarly productivity. Yet most promotion criteria do not reward time devoted to curricular change initiatives. Other external demands, such as a reaccredidation self-study, program review, or strategic planning process, also compete for faculty time.

Nearly all social work programs are faced with limited curricular space and program length to accommodate the rapidly exploding knowledge base for social work practice—with social problems, societal issues, types of interventions, and policies changing and expanding rapidly. To illustrate, 9/11, the Iraq War, the growing Muslim population in the U.S., and the immigration rights movement have all created challenges for inclusion of new content in social work curricula that could not have been anticipated at the beginning of the 21st century. As noted earlier, faculty understandably may feel that they cannot "add one more thing" to

their already crowded course content. In addition, infusing gero competencies and content may be perceived as taking something away from what faculty already teach or as expecting them to master a whole new content area.

Ageism is inherent in our society, where youth is valued more highly than old age. It manifested among faculty in GeroRich projects in a number of ways, including jokes about their own aging. As individuals living within this larger context, many faculty members in programs with GeroRich projects did not see the need for, or value of, teaching about aging and older adults. Some faculty perceived older adults as being better off than younger populations or as not having as pressing needs as those of historically disadvantaged populations. As another example, ageism can be expressed through attaching greater importance to preparing students for work with at-risk youth who have more years ahead of them to contribute to society than with elders whose lives are nearly over. Other faculty may not have had positive interactions with older adults or feel uncomfortable with such exchanges. Or they may be fearful about or in denial of their own aging. In addition, the growth of the older population may seem abstract—some distant future problem—even for faculty who are already joining the Senior Boomers. For example, some GeroRich projects found that citing demographic data had little impact on changing negative or ageist attitudes among faculty. Instead, faculty often countered the data by citing students' disinterest in aging: "We know that the older population is growing rapidly—but try telling that to students who just want to work with young kids." They claimed that they could not justify teaching about older adults and aging when there was little student demand or interest.


Regardless of the nature of a curriculum change initiative, some faculty members will cite academic freedom as a basis for not wanting anyone else "telling them what to teach"—whether an accreditation commission or their colleagues. Such resistance is intensified if they do not see how issues of aging and older adults relate to their teaching, research interests, and expertise.

GeroRich project directors recognized the advantages of assessing the extent of support and resistance among different categories of faculty stakeholders—senior opinion leaders, adjunct faculty, and new faculty. In most instances, new and adjunct faculty tended to be supportive of gero infusion, in part because they are not as likely to be committed to past course content. And the engagement of

adjunct faculty was critical since they taught many of the foundation courses in some programs. Senior faculty varied widely across programs in their extent of initial support. And, since most organizational analyses identified the importance of senior faculty as opinion leaders, if their support was not obtained over time, gerontological curricular changes were less likely to be adopted and sustained.

**Analysis of academic administrators' support**

Public support and legitimization of project directors' work by their dean, director, or chair facilitated the success of gerontological infusion. For example, such support, expressed at faculty or curriculum committee meetings, or in e-mails or newsletters, signaled to faculty colleagues that this was a programmatic initiative they should endorse. Administrative support was also expressed through the match required for programs to participate in the GeroRich Project.

Tangible forms of administrative support were extremely helpful but not essential to curricular and organizational changes. The most helpful was a reduction of the project director's workload, such as a course buy-out, since faculty time is often the most valuable—and scarcest—resource. Research or staff assistants helped GeroRich project directors assess curricular needs and then tailor teaching resources to faculty colleagues. Such staffing arrangements freed up project directors' time for doing the conceptual work and for garnering other types of support. Similarly, fiscal resources to foster faculty development opportunities (e.g., conference travel, workshops, e-learning, library and AV resources, and guest speakers) increased organizational readiness for gerontological infusion. However, the GeroRich Coordinating Team recognized that many programs did not have the capacity to provide staff assistance, fiscal resources, or workload flexibility. These supports are a bonus but not absolutely essential to achieve gerontological infusion in a program's curriculum and organizational structures. Many GeroRich projects implemented sustainable changes without requiring extensive additional resources in time or money.

**Analysis of community stakeholders' support**

Community practitioners, including field supervisors and alumni, tended to be most supportive of GeroRich project curricular and organizational change goals.

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*"The project has also given us the opportunity to re-connect with our field instructors in aging so that some exciting work might emerge. Field instructors have shown willingness to join a field advisory committee and to produce practice materials for our teaching manual."*

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In an organizational analysis of how community stakeholders can support the planned change process, it can be helpful to enumerate the groups whose support is needed: field supervisors, alumni, directors of agencies where students have opportunities to work with older adults and their families, other gerontological

social work practitioners, and older adults and their families. Most social work programs want community stakeholders to commend—and certainly not to be critical of—their professional preparation of graduates. Because of the importance of community support, the majority of GeroRich projects developed some type of community partnership that enhanced the success and sustainability of their curricular and organizational changes.

Similar to the curriculum analysis—and just as with students and faculty—focus groups to gather data on practice trends can serve as a way to garner practitioner support.

**SAMPLE FOCUS GROUP QUESTIONS FOR PRACTITIONERS**

How frequently do social workers in your agency work with older adults?

When they do so, what knowledge, skills, values do they need?

How well prepared are social workers in your agency to work with elders?

What are your suggestions for preparing social workers with gerontological competencies through our foundation curricula—both field and classroom?

Last, in what ways can you assist our program in preparing gerontologically-competent graduates?

Several types of already existing structural arrangements in programs with GeroRich projects facilitated attaining community stakeholders' support. These included an advisory board to a social work program composed of practitioners, community leaders, and donors; a Field Advisory Board, Council, or Task Force of practitioners and faculty; an alumni association; annual lectures or alumni events that bring practitioners into the building; and opportunities for older adults and their families to participate in a program's organizational culture—as guest speakers in classes or special colloquia, advisory board members, or students. Although social work programs vary in their receptivity to practitioner and consumer input, nearly all programs include some involvement by alumni and field supervisors in the organization, which can provide a good place to start seeking community input and support for gerontological curricular changes. As noted above under the section on curricular analysis, the majority of GeroRich projects developed effective aging-focused advisory mechanisms as a way to structure practitioner input on foundation gerontological knowledge, skills, and values.

**Understanding student support and resistance**

Many GeroRich projects reported that fostering students' interest in gerontological social work issues was a major challenge—often more difficult than engaging faculty and community stakeholders.

As noted by one project director at the end of the planning year, *"…while the faculty and community gerontology professionals embraced the change, students are still hesitant about working with older adults. It has been difficult to dispel myths and move students toward embracing work with older adults."*

Similar to faculty who hold ageist attitudes, students, especially younger ones, have absorbed the ageism inherent in mainstream Western culture. Many students have had little contact with older adults, outside of their own families, or have had negative interactions with elders. Fear of the unknown and of difference also underlies student resistance. When it comes to choosing an area of specialization, the majority of social work students want to work in child and family welfare, which they view as more complex and challenging, and as having greater potential for evoking change than would be possible in a gerontological social work career. Additionally, most students need financial support, particularly during graduate school, and thus are attracted by the widespread availability of Title IV-E funds to work with children in public child welfare settings.

Student recruitment to gerontology as a specialization per se was not a priority in most GeroRich projects, however. Rather, following the lead of the GeroRich Project's infusion mandate, individual projects presumed that by embedding gerontology into foundation content, students who were prepared with these foundation gero competencies would also be more open to considering a gerontological social work career. In other words, successful infusion so that all students acquire gerontological competencies became GeroRich projects' overall strategy instead of recruiting students to a gero-focused specialization. For instance, providing students with an opportunity to interact with elders for the first time through service learning, a field placement, or an oral history interview assignment in a HBSE course was an effective way to "hook" them on some of the joys of working with older adults—often much more effective than providing students with a brochure citing demographics.

A 19-year-old student commented, *"My elder lets me help him and he appreciates everything I do for him. Yet he teaches me so much about relationships and how important they are. He lost his wife and he has no close family. Now I realize how important my family is."*

This meant that recruitment of gerontological specialists sometimes followed successful gero infusion in the foundation classes and field placements in GeroRich projects.

In one BSW program where diversity is the signature theme, students were given the opportunity to focus their diversity course assignments on older adults.
*"Course instructors and advisors on diversity projects all agree that there is much more chatter about aging and older adults than ever occurred before we started the infusion process. Such chatter includes spontaneous bringing up of aging issues by students, questions about aging concerns, and students making sure that older adults are not left out of course content and class discussions."*

## Selection of Gerontological Competencies

Foundation gerontological skill competencies are what every BSW and MSW graduate should be able to *do* to work effectively with older adults and their families; such gerontological *skill* or *performance* competencies are based on gerontological *knowledge* and *values* in foundation content. GeroRich projects were encouraged to select and infuse gerontological social work competencies, but they were not required to do so. Over the three years of funding, 24 programs planfully infused competencies into their foundation courses. The others typically infused gerontological content and teaching resources that were not explicitly linked to specific gero competencies.

A competency-based approach to gero curricular infusion has the following advantages. It avoids "putting the cart before the horse"; in other words, it prevents the pitfall of developing gerontological foundation content without first being clear about outcome-based goals both for the foundation curriculum as a whole and for targeted courses. It helps determine "how much gero infusion is enough"; in other words, how much and what type of content on aging and older adults is needed to support students' attainment of foundation gerontological competencies. And last, a competency-based approach provides a basis for measuring students' learning.

At the beginning of the GeroRich Project, participating social work programs had two sets of competencies from which to select (the *CSWE SAGE-SW Competencies* or the PPP *Geriatric Social Work Competency Scale*) or they could develop their own set. The *CSWE SAGE-SW Competencies,* a list of 65, was organized in terms of foundation knowledge, skills, and professional practice. This list was developed by the SAGE-SW Project through a survey of 946 educators and practitioners. Competencies were organized into four *domains*: 1) Values, Ethics, and Theoretical Perspectives; 2) Assessment; 3) Intervention and Aging Services; 4) Programs and Policies. It is unrealistic, however, for faculty to organize content around 65 foundation competencies—or for students to attain such a large number of competencies. The New York Academy PPP's *Geriatric Social Work Competency Scale* is a measurement tool by which students assess their gerontological skills.

This scale, however, is less useful for assessing knowledge and values. It has generally been completed by students at the time of matriculation and of graduation or at the beginning and end of their practicum. Because the PPP focuses on only graduate education, the scale was initially used only with MSW students, but it is also relevant to BSW programs. Both sets of competencies that were available to GeroRich projects are included in the Appendices.

Thirteen of the 24 programs that defined competencies either had existing foundation competencies, and thus developed gerontological competencies within them, or created their own foundation gero competencies that were congruent with their program's mission. Such programs attested to the intensive work required to develop competencies, but also to the benefits from being able to measure how well their graduates were prepared for gerontological social work.

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One program developed gerontological competencies within their already existing 14 practice competencies. According to the project director, *"…these aging sub-competencies are now formally recognized as a permanent part of our social work program and included whenever Program competencies are presented. All social work students beginning in their first year in our program must demonstrate appropriate levels of aging sub-competency as measured by meeting course-related objectives."*

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Subsequent to the GeroRich Project, these two sets of competencies were refined and reduced in number by the CSWE Gero-Ed Center and the PPP. The foundation gerontological competencies were reduced from 65 to 39, and the PPP rating scale was further tested, reduced in length, and made available for use by BSW as well as MSW students. This revision process reflected lessons learned from GeroRich projects' attempts to infuse competencies; in particular, projects noted the need to differentiate foundation competencies as a guideline for curricular infusion from competency rating scales that were more focused on skills. Another lesson learned was the importance of identifying ways for gerontological competencies to intersect with cultural competencies, although considerable work remains in this area. The validity problems inherent with student self-ratings were recognized. In fact, some students rated themselves lower on the competency scale at graduation—perhaps because they had learned more about what they did not know! Nevertheless, GeroRich projects that used the PPP scale established that measures of student assessment of changes in baseline skills at the beginning and end of their programs were one source of data for determining the impact of gero infusion on students' performance.

Programs that chose to identify gerontological competencies were encouraged to determine the course content needed to ensure students' attainment of the selected competencies and then to make available resources (case studies, discussion

questions, assignments, readings) for teaching both the competencies and content. GeroRich projects also recognized that attention needed to be given to the pedagogical approach most effective for competency attainment, and typically emphasized experiential learning. Gerontology as pedagogy is discussed more fully in Chapter VI, Lessons Learned. In retrospect, the Coordinating Team recognized the value of requiring a competency-based approach of all projects, rather than leaving it to the program's discretion. The programs now participating in the Gero-Ed Center's Curriculum Development Institutes are required to use a competency-based approach for their gero curricular infusion efforts. The increasing role of competency-based education for social work professional preparation is discussed in Chapter IX, Future Directions.

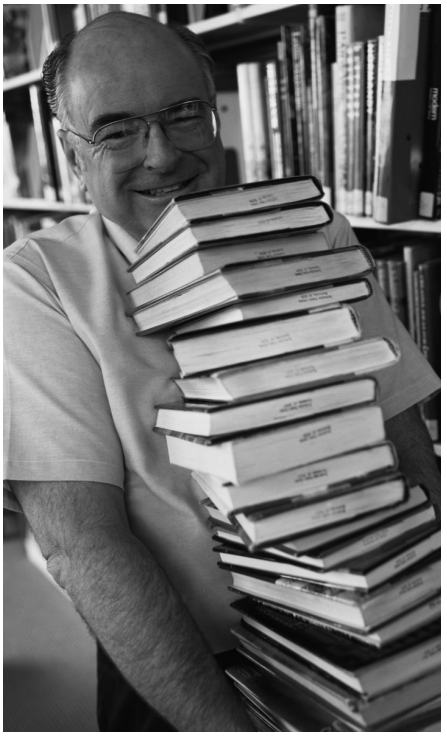
### *Measures*

From the outset, choosing and/or developing measures was meant to be a critical component of the goal-setting process in the GeroRich Planned Change Model. All GeroRich projects were required to measure the impact of their gero infusion efforts on faculty, students, curriculum, and organizational culture The Coordinating Team emphasized the conceptualization of evaluation as part of good strategic planning and programming, not as an end in itself. The evaluation was seen as a means to help projects accomplish their goals, document changes that occurred as a result of implementation, and summarize lessons learned. Projects used summative measures of common and program-specific measures along with process evaluation to delineate the impact of changes accomplished.

***Common Outcome Measures*** designed to determine curricular and programmatic changes that occurred as a result of gerontological infusion were developed by the GeroRich Coordinating Team.

**Examples of common measures:**

- Number and percentage of faculty who changed their foundation courses to include gerontological content.
- Number and percentage of foundation courses that include gerontological content.
- Number and percentage of faculty participating in gerontological content training/faculty development.
- Number and percentage of students exposed to gerontological content in each foundation course.
- Number and percentage of students exposed to gerontological content in other required courses, electives, fieldwork/practicum, non-practicum, and community-volunteer or service learning experiences outside the classroom.



A list of all the common outcome measures used is in the Appendices. By the end of the GeroRich Project, these items had been revised as a Likert scale, where project directors would rate the extent of change. These findings are reported in Chapter VIII, Impact of the GeroRich Project. A Likert scale approach was adopted because of problems with the absolute nature of numbers and percentages. For example, if 22% of programs responded that they had infused aging into foundation courses, this provided no information about the extent of infusion.

All projects were required at the end of Year 2 (Implementation) to submit samples of revised course syllabi, teaching resources, and other printed materials that had been modified as a result of GeroRich funding. These materials were then reviewed using Criteria for Infused Syllabi and Selection of Teaching Resources (see Appendices). Those that ranked high on such criteria were then disseminated via the GeroRich Web site. Many of these syllabi are available on the current Gero-Ed Center Web site in the Teaching Resources section.

***Program Specific Outcome Measures*** were developed independently by individual projects or adapted from a comprehensive list organized by student, faculty, institutional, and field measures that were provided by the Coordinating Team.

**Examples of program-specific outcome measures:**

- Student and faculty completion of the Geriatric Social Work Competency Scale.
- Number of students with an interest in a gerontological social work career.
- Number of students in aging-related field placements.
- Number of non-aging field placement agencies that provide opportunities to work with older adults (e.g., grand-parents in a child welfare setting).
- Analysis of aging content in student recruitment or admissions materials or program goals and objectives.
- Collaboration between gerontological faculty and those from other substantive areas (e.g., child welfare, health care).

There was wide variation in the program-specific measures selected because of the range in size and type of programs participating. Project directors were advised to choose program-specific measures based on the following questions: 1) What will this tell me and why is it important to know (e.g., how is it connected to the overall goals of gerontological pervasiveness and sustainability)? 2) Who are my audiences and what kind of information is important to whom?

***A Process Evaluation*** was also expected. To accomplish this, project directors kept notes of what worked, what didn't, and why—in other words, the lessons learned. Project directors were provided with some questions to guide their process evaluation.

**Samples of these questions:**

- If your project could be started over again, what changes would you make?
- How have you approached obstacles? First describe the obstacles and what you did, if anything, to overcome them.
- How did you build on the supportive factors in your situation? Describe the factors that helped you succeed.
- What strategies worked with gaining the support of different stakeholders? What did not work? How did strategies differ across the planning and implementation years, if at all?
- What were unexpected experiences in your process of implementing changes? How did these experiences contribute to or hinder your planned change efforts?
- What would be the most important advice that you would give to other sites seeking to "gerontologize" their curriculum?

These qualitative data provided the richest source of information for reviewing and understanding the challenges and progress of each project and for revising goals and strategies across the three years. And these data form the basis for the conclusions presented in Chapter VI, Lessons Learned.

The most frequently used program-specific measure was the combination of student pre- and post-tests. As noted above, the PPP's competency rating scale and/or other surveys on gero knowledge, skills, and values were administered at the point of student matriculation (pre-test), again at the end of year 1, and finally upon the completion of the program (post-test). Exit interviews or exams immediately prior to graduation were also used to assess how well students were prepared to work with older adults and their families. Some programs with exit exams added gero-focused questions to the exam, either asking about gerontological content or asking students to assess their competencies to work with elders. Those with exit surveys

added questions about the attainment of gerontological knowledge and skills. And those with an annual employer survey included new questions about gerontological competence on it. Practitioners knowledgeable about the social work program and curriculum—as field supervisors, alumni, part-time course instructors, or advisory board members—were best situated to provide feedback on graduates' preparedness.

The GeroRich Project Coordinating Team compiled data related to measures over the three years of the project funding and in follow-up reports. Analyses of data from the individual projects' annual progress reports, and particularly from the five-year follow-up report, are presented in Chapter VIII, Impact of the GeroRich Project.

## Conclusion

This chapter has focused on the planning phase of the GeroRich Planned Change Model. Conducting thorough curricular and organizational analyses was typically time-consuming but essential to laying a solid framework for setting goals, choosing outcome measures, and, in some instances, selecting competencies to be attained by the end of the foundation year(s). Because of the two-year limit on funding, it is not surprising that most GeroRich projects began to implement changes before completing all components of the planning phase. This pattern is understandable also in light of pressures, whether real or perceived, to start making visible changes. Nevertheless, the Coordinating Team encouraged projects to return to particular aspects of the planning phase, such as understanding the sources of resistance to change, when they encountered obstacles to implementation. GeroRich projects were regularly reminded of the value of reviewing planning documents, such as the curriculum change reporting framework or their analyses of curriculum and organization, both to enhance their implementation strategies and to promote sustainability of the changes made. The focus next turns to implementation and sustainability.