Lessons Learned

Chapters IV and V describing the Planned Change Model identified lessons learned—what worked and what didn't—specific to each phase of the change process. In this chapter, lessons learned that cross-cut all phases of the project, including some unexpected findings, are presented that are salient to future social work education curricular and organizational change initiatives.

PROCESS OF CHANGE SIMILAR REGARDLESS OF PROGRAM SIZE OR TYPE

An underlying assumption in the conceptualization of the GeroRich Project was that change strategies and outcomes would vary by program location, size, and level (BSW or MSW). This was reflected both in the attention given to reaching out to inform and funding programs that varied by size, degree level, and geographic location, and even in the formation of problem-solving groups based on such criteria at the yearly regional workshops for project directors. Contrary to this assumption, an unexpected finding was that the overall change process appeared to be similar for all participating GeroRich programs. Analysis of Year 3 GeroRich data by Sanders, Dorfman, and Ingram (under review) identified that few significant differences in guiding principles, curriculum goals, outcome measures (e.g., increases in the number of foundation courses that included geriatric content), and lessons learned were found across the three categories. The only statistically significant differences identified by Sanders et al. were that rural programs were more likely than urban or joint programs to include goals related to the field, and that MSW programs were more likely than BSW programs to identify curricular enrichment as a guiding principle. Throughout, this monograph notes how specific strategies and actions taken have varied by program type, size, and location. But overall, the patterns and process of programmatic change and curriculum infusion were similar across different types of social work programs; this finding contrasts with a commonly held assumption by some social work educators that such programmatic differences need to be explicitly considered in curricular and programmatic development initiatives. Although based on data from only 67 social work programs, this finding raises questions about whether curricular change initiatives need to be targeted by program type or geographic locations. However, because of the small size of the GeroRich sample and wide reporting

variations, more research is needed on whether and how the change process varies across these and other programmatic variables. What is clear is that the specific strategies chosen for curricular and organizational change do need to be congruent with program mission, location, and size—even though the overall change process may be similar.

CURRICULUM AS CLASSROOM AND FIELD: THE IMPORTANCE OF COMMUNITY PARTNERSHIPS

The initial conceptualization of the GeroRich Project focused largely on foundation classroom content and only secondarily referred to field-based learning. This was in part because when the GeroRich Project was conceptualized, graduate field education was perceived as the domain of the Practicum Partnership Program (PPP) through the New York Academy of Medicine. However, once engaged in the planning process, GeroRich projects and the Coordinating Team soon realized that the practicum or field experience must be conceptualized as part of both the MSW and BSW foundation curriculum, rather than just considering the classroom curriculum. Accordingly, changes in the field needed to parallel and support those in the classroom and vise versa, especially since the majority of social work students consistently rate their field experience as the most valuable part of their professional preparation. For example, gero competencies need to be infused into
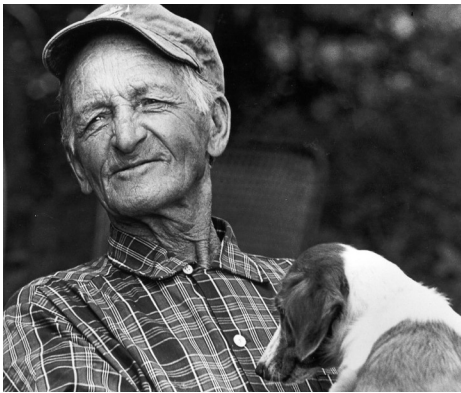
 foundation field experiences in non-aging focused sites, an approach congruent with the GeroRich emphasis on preparing all graduates with gerontological competencies in the classroom. Although some GeroRich projects developed more aging-focused field sites for advanced placements, this was viewed as secondary to infusing gerontological competencies and opportunities into all foundation field sites.

Social work education has long recognized the importance of integrating class and field curricula, but relatively few programs have developed effective integrative models. In spite of the leadership of groups such as the CSWE Commission on Field Education and individual educators and practitioners, the practicum and the faculty associated with the field are too often viewed as secondary to the classroom curriculum and its faculty. GeroRich projects' initiatives to more effectively integrate classroom and field foundation curriculum typically began with obtaining practitioner input, especially that of field supervisors, during the curricular and organizational analysis phase. As noted in Chapter IV, The Planned Change

Model: Curricular and Organizational Analyses, such input was structured through advisory boards, which were developed by about 50% of the projects, focus groups, surveys, and one-on-one consultation. Without exception, practitioners welcomed such opportunities to collaborate with social work education programs.

One GeroRich project director noted, *"one reason for such enthusiasm was that agencies serving older adults are generally not overburdened with student requests and visits!"* Another wrote in her evaluation, *"I admire your faculty team's commitment. Our work is not just about 'helping old people' but also about helping generations now and in the future."*

Overall, practitioners appeared to value the opportunity to contribute to professional education by providing practice-based teaching resources and ongoing feedback on the gerontological preparation of students placed in their agencies.

Such partnership structural arrangements were also found to enhance the sustainability of changes made. Ongoing mechanisms for practitioner input were identified as critical to ensuring that students were being prepared in the classroom with foundation gerontological knowledge, skills, and values that could be transferred to the field setting. In most instances, community partnerships convened in the planning phase continued in some form after funding ended, although only about 12% maintained a formalized advisory structure at the end of Year 3 (McCaslin & Barnstable, 2006). Generally, the advisory committee was, over time, folded into other organizational arrangements, such as Continuing Education, the program's general advisory council, the Curriculum Committee, or a speaker's bureau for classes. In other instances, advisory board members were involved as instructors in continuing education courses on issues of aging and older adults.

An example of the ongoing impact of convening advisory board members during the funded project: *"the GeroRich project increased our program's involvement with the University's Summer School of Gerontology, the largest continuing education event for older adult providers in the state. Our program also provides representatives to the state's Gerontology Board, which includes all academic institutions working to strengthen gerontology as well as the major agencies"*
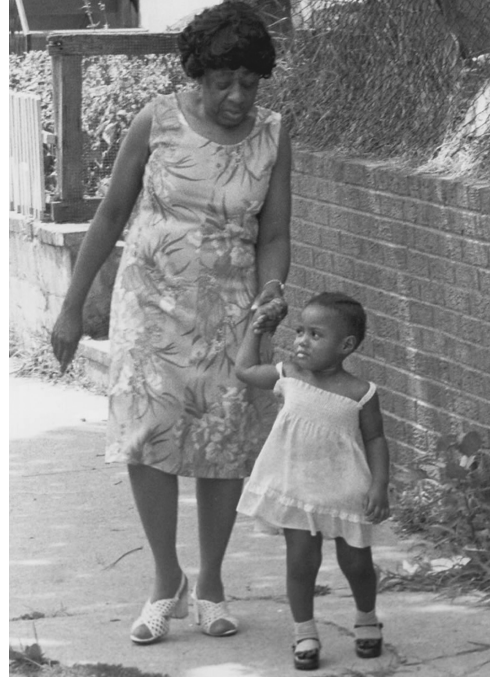

Another strategy to sustain community partnerships was for advisory board members to be available for class and colloquia presentations and to provide practice applications of theoretical concepts. Some partnerships were sustained by faculty providing field supervisors with evidence-based curricular resources and by faculty's

involvement in partner agencies as board members or pro bona consultants. Overall, BSW programs were more likely to continue some type of community partnerships and to sustain faculty and student contributions in the community and agencies after funding ended than were MSW programs (McCaslin & Barnstable, 2006).

The most frequent barriers to effective classroom and field integration were the lack of foundation field sites that provided opportunities to work with older adults and their families; of field instructors in foundation sites with foundation gerontological knowledge, skills, and values; and of MSWs to supervise students in both non-aging and aging-focused sites, especially in rural areas. The strategies to address these needs were interconnected. These included providing foundation gerontological training for field supervisors as part of ongoing requirements for practicum supervision; collaborations with practitioners to identify older clients in most non-gero-focused sites; the use of service-learning sites, especially in BSW programs, to provide students with experiences to interact with elders and their families; the requirement that all foundation students have an opportunity to interact with an older person in their practicum; engagement of retired faculty or practitioners with MSWs to supervise students; and implementation of site-visit days for students to visit agencies that served older adults. Over time, these strategies served to increase the number of opportunities to interact with older persons in the foundation field assignments as well as supported the infusion of gerontological practice and policy content into the classroom.

An unexpected finding was the value of creating opportunities to interact with relatively healthy older adults in community-based settings during the foundation practicum. Because of misconceptions that work with frail elders in long-term settings is not complex or challenging, many social work programs offer placements in nursing homes or assisted living facilities as foundation placements. Yet students tend to resist foundation placements in a long-term care or hospital setting, in part because of their own discomfort with the illness and death associated with old age. This arrangement fails to take into account that practice with frail elders is typically much more challenging than work with relatively healthy elders in community-based settings. Those responsible for student placements might consider reversing this traditional placement pattern, thereby using community-based settings with healthy elders as the foundation placement and sites with frail elders as the advanced placement requiring specialized skills. Although such a shift might be educationally sound as well as serve to recruit more students to aging-focused field sites, a major barrier is the lack of MSWs in long-term care settings, such as nursing homes and assisted living, to be able to supervise MSW students in their advanced practicum. Instead, BSW-level graduates are most frequently hired by long-term care facilities, which also often serve as senior year field sites for undergraduates.

Overall, student stereotypes about aging may best be addressed through their exposure to the wide diversity of older adults in terms of health status, personality, family structure, experiences with historical disadvantage, and living arrangements. As described in Chapter IV, students who interacted with elders and their families in their practicum or a service-learning site often brought these experiences into the classroom, thereby strengthening the practice applications of theoretical content in readings and lectures, and serving to link the classroom and field. In addition, these strategies frequently had the effect of recruiting more students to consider a gerontological social work career. For example, when field supervisors for foundation practicum are knowledgeable about older adults and do not express ageist attitudes, students are more likely to consider working with elders. Students in GeroRich funded projects often became the best recruiters of their peers when their positive placement experiences were disseminated through the student informal grapevine.

One program required BSW juniors to perform the role of friendly visitor with residents of a retirement home. *"Students report being surprised at the extent that elders are 'normal' and that elders are engaged with families, friends, and social activities. Another student experienced kindness from someone formerly perceived to be a 'grumpy' old man."*

For MSW programs, one major indicator of the GeroRich projects' efforts to integrate classroom and field curriculum is reflected in the number of GeroRich-funded programs that have subsequently received Practicum Partnership Program (PPP) funding. Of 36 programs funded by the PPP in 2005-06, 12 had also been GeroRich funded. These programs are now bringing their knowledge of how to infuse gerontology in foundation curriculum to PPP initiatives to increase gerontological competencies in advanced course work in both the classroom and field. In addition, some of the PPP programs are also targeting foundation field experiences, although the majority are focused on advanced placement opportunities in MSW programs. The PPP model has not yet been extended to the BSW program level.

The Importance of a Competency-Based Approach to Gero Infusion

As noted in Chapter IV, GeroRich projects were strongly encouraged but not required to utilize a competency-based approach in the foundation curriculum. Among the 24 projects that attempted to infuse gerontological social work competencies, they either developed their own competencies or utilized already existing ones. Twelve stated that they used the SAGE-SW competencies, which were the foundation competencies most widely available to GeroRich projects (Cohen, Murray, Berg-Weger, Greene, & Tebb, 2005). Because of the importance of being able to measure what students can do or perform at the end of the foundation year, the Gero-Ed Center now requires all participating programs to select and infuse competencies from a List of Foundation Gerontological Competencies. Similarly, while a number of GeroRich projects used the PPP Geriatric Social Work Competency Scale as a program-specific measure for their MSW students, current Gero-Ed Center programs, especially those participating in the Curriculum Development Institutes, have been strongly encouraged to use this student self-rating scale as a program-specific measure with both BSW and MSW students. Thus a major lesson learned has been the importance of requiring a gerontological competency-based approach, even though many faculty and community practitioners may experience the process of achieving agreement on how to attain competencies and measuring competency-based outcomes to be challenging.

One reason that a competency-based approach is such hard work is that most faculty members are accustomed to teaching in terms content, not competencies and outcomes, given past Educational Policy and Accreditation Standards (EPAS). Amongst GeroRich projects, the following conditions increased the likelihood of successful infusion of gerontological competencies in foundation courses:

- Faculty and practitioners (field supervisors) collaborated on the process of selection and/or development and were able to reach agreement on the gerontological content needed to support attainment of these competencies.

- They utilized existing gerontological competencies (e.g., the SAGE-SW or PPP competencies) rather than created their own.

- Faculty and field supervisors who teach in a foundation area were involved in selecting a feasible number of competencies from the lists available at that time (SAGE-SW and PPP) rather than attempting to infuse all competencies. As with all strategies used, projects were encouraged to use feasibility as a selection criterion, thus often resulting in targeted and incremental approaches.

- The competencies were directly tied to foundation course (both classroom and field) goals, objectives, and outcome measures.

- ■ Content on older adults and aging was explicitly linked to the appropriate competency.
- ■ Teaching resources (e.g., case studies, readings, assignments, AV materials) were tied to specific competencies.

A competency-based approach also served to integrate classroom and curricular changes. One way in which this occurred relates to that fact that competencies—the skill performance that reflects knowledge and values—are easier to attain and measure in field settings than in the classroom. In other words, competencies become "real" to students in the field. Yet competencies developed and measured as part of their field experiences will, over time, influence the classroom curricula. In fact, it is essential that students be measured on the same sets of competencies in the classroom and the field setting

Developing social work competencies and workplace performance measures is an exciting challenge for the profession. In the future, Competency-Based Education is likely to guide educational policy for all social work programs. This would be a shift from the current EPAS, which largely prescribes content. The competency development and measurement through SAGE-SW, PPP, GeroRich, and most recently the Gero-Ed Center can provide templates for social work programs challenged to develop foundation and advanced competencies that are congruent with their mission and goals. Despite the progress made, more attention needs to be given in the future to ensure that gerontological competencies reflect the diversity of the older population in terms of race/ethnicity, gender, sexual orientation, social class, and functional ability. A challenge for the profession is the promotion of cultural competence in working with historically disadvantaged populations and its intersection with both foundation and specialized gerontological competencies.

Model course syllabi developed by GeroRich projects that have successfully infused competencies are accessible on the Gero-Ed Center Web site. In response to the lessons learned about the importance of a competency-based approach, the Gero-Ed Center staff continues to develop tools such as competency templates and action sheets, available on the Gero-Ed Web site, that build upon and advance the competencies that were used by some GeroRich projects.

GERONTOLOGY AS PEDAGOGY

Another lesson learned that was not fully anticipated at the inception of the GeroRich Project was the importance of GeroRich participants attending to the *how* of teaching gerontological content, not just *what* they teach. In fact, GeroRich project directors early in the implementation phase recognized the value of addressing pedagogical issues. Because most students lack experience with older adults, experiential learning opportunities tended to be the most effective in

engaging them and promoting their learning. In addition to service learning and field placements, the most frequently used experiential approach was to require that students in a foundation practice or human behavior and the social environment (HBSE) course interview an older adult, a requirement that has been sustained in most GeroRich-funded programs. Such interviews tended to be most productive when the instructor provided students with guidelines for effective interviewing and in some instances, even role played interviewing techniques. In most instances, students were encouraged to view the interview process as collaboration, not something they were "doing to" older adults. One GeroRich project implemented and raised funds through a statewide oral history project by a consortium of social work programs. Another produced a monograph of interviews that was disseminated not only within their school, but to the broader community. GeroRich-funded programs that required such interviews also had to attend to

the Institutional Review Board (IRB) requirements of their institutions. In most instances, student interviews did not require Human Subjects approval, since they were considered part of students' education; however, IRB approval was necessary if faculty or students planned to publish based on their interviews or any other research involving older persons.

Other experiential opportunities included inviting elders to speak to classes or at colloquia, engaging students in research projects with older adults, and involving elders as students in the classroom. Some programs developed recruitment videos that portrayed alumni working with elders in a wide range of settings. Another effective pedagogical approach was the use of case studies in foundation practice classes, ideally with content provided by practitioners. Developing a teaching case book for faculty on how to use the cases increased their utilization. And the case study became "alive" when retired practitioners participated in discussions regarding each case.

MEASUREMENT AND EVALUATION

In general, evaluation of the planned change process in GeroRich projects was most effective when it was incorporated into a program's existing mechanisms for evaluation, such as student exit interviews, alumni and employer surveys, course evaluations, and curriculum decision-making processes, rather than added on as another expectation. Not surprisingly, students were typically the best source of data about what gerontological competencies and content were taught in the classroom and field, and pre- and post-tests of students' competencies allowed

evaluation of what students learned as a result of increased exposure to gerontological content.

One important challenge was data collection, related in part to the short start-up time for GeroRich projects, with those funded beginning in January 2002 having only an eight-month planning phase (the Implementation Year began September 1). Faced with a short planning phase that included the summer months, both the Coordinating Team and the individual projects failed to devote adequate time to conceptualizing and testing outcome measures. While GeroRich projects were required to gather data on common outcome measures, these were not developed by the Coordinating Team and disseminated to the individual projects until the beginning of the implementation phase in Year 2. These common measures differed to some degree from the baseline data already gathered by projects as part of their planning. This meant that the GeroRich Project lacked adequate common baseline data, which limited the Coordinating Team's capacity to measure changes across programs since the Project's inception. A major lesson learned for the planning and implementation of the Gero-Ed Center's current Curriculum Development Institutes (CDIs) was to require that all CDI programs gather baseline data on the same common measures before beginning the planning process. GeroRich projects were also strongly encouraged to gather data on some program-specific measures, but varied widely in whether they did so. Another lesson learned that has been translated to the current CDI programs is that all participants are required to choose program-specific measures from among a list developed by Center Coordinating staff. Most importantly, the GeroRich project directors and the Coordinating Team who analyzed the lessons learned from GeroRich recognized that future curriculum and organizational change initiatives should be consistent in their expectations related to measurement of outcomes.

Despite these limitations of the GeroRich pre- and post-project data gathering, the range of measures used allowed the GeroRich Coordinating Team to determine the positive impacts of gerontological infusion on both curriculum and programmatic structures. These impacts of the GeroRich Project are described in Chapter VIII.

DISSEMINATION

All GeroRich projects were expected to disseminate what they learned as a result of their planning, implementation, and evaluation. The Coordinating Team recognized that dissemination needed to be broadly defined, given the range of infrastructure support for scholarship among such diverse programs. GeroRich project directors who were junior faculty faced pressures to publish to meet promotion and tenure expectations. In such instances, mentoring by the GeroRich Principal Investigator and by other senior faculty was often a necessary condition for them

to translate findings from their evaluations into conference presentations and peer-review publications. For GeroRich project directors in institutions oriented primarily to teaching and community service, dissemination encompassed presentations at state and regional conferences where travel costs were not a barrier to participation as well as monographs, videos/DVDs, newsletter articles, and Web sites, rather than only traditional scholarly formats.

A lesson learned by the Coordinating Team, however, was not to prejudge the scholarly potential of GeroRich project directors based on the size or nature of their institutions. An unexpected finding was that many of the GeroRich project directors who have presented most widely at national conferences and published peer-review articles based on their project teach in non-research oriented institutions. Their unanticipated success in publishing may be because their GeroRich project provided them with readily accessible data, national mentoring, administrative support, and national venues for such scholarly work. Regardless of the factors that might explain the scholarly success of project directors in primarily teaching-focused programs, the GeroRich Project provided an opportunity to advance the scholarly goals of many project directors.

SUSTAINABILITY

One of the most important lessons learned is that when sustainability is more broadly defined than only funding, faculty members tend to be very resourceful in locating and creating different ways to ensure sustainability, as reflected in the ten methods detailed in Chapter V on Implementation and Sustainability. Even project directors in small social work programs with limited discretionary resources identified creative ways to institutionalize changes (in-kind contributions from agencies, such as meals, speakers, training materials, and meeting space) or building intersections with other populations (such as children or persons with addictions) to garner resources.

On the other hand, GeroRich project directors were initially not very resourceful in the area of marketing and public relations. Overall, GeroRich project directors needed encouragement and training in strategic marketing of their gero research, practice, and education. Many of them did not perceive their accomplishments as noteworthy, of interest to others, or worthy of funding. However, even small successes in both marketing and fund-raising, especially with private donors, were highly reinforcing, with some project directors surprised at both their fund-raising successes and their enjoyment in doing so.

One project director expressed delight that *"an advisory board member had decided to fund two student scholarships a year."*

When their accomplishments were written up in a local newspaper or college newsletter or garnered some additional support, GeroRich project directors enjoyed the recognition and element of prestige, and became even more committed to creative resource development efforts that enhanced sustainability.

Sustainability was typically defined in terms of institutionalization of visible and sometimes formal changes in structural arrangements (e.g., decision-making procedures, a program's print and electronic materials), but in many cases sustainability was more subtle.

The subtle and pervasive nature of sustainability was vividly reflected in one project directors' statement that, *"When the PPP RFP was announced, there was no question that our school would go for it…this was an entire change of attitude from four years ago when I had to build up faculty support to even apply for GeroRich."*

Some project directors referred to colleagues who informally talked about what they were doing to infuse gerontology, finding in their mail files gero teaching materials that faculty had developed for their own classes, and other faculty spontaneously reminding new colleagues to include gerontological content in their classes. Such anecdotal evidence of "gero friendly" learning environments serves as both indicators and promoters of sustainability.

Conclusion: The Ripple Effect

The Hartford GSWI logo is a blue swirl that can be interpreted as a ripple, with a pebble in its middle, reverberating and touching countless lives. Many of the GeroRich projects captured the ripple effects of the change process—how changes in one area of the curriculum or program then affected other components—as well as students, faculty, the community, and elders themselves. This ripple effect might be referred to as the diffusion of innovations in the organizational change literature. The ripple concept is also a reminder that carefully planned change processes can have unanticipated outcomes. In effect, as faculty, students, and practitioners experienced some of the positive benefits of early curriculum changes—whether enriched course content, quality teaching resources, jobs for graduates, or alumni support—gero curricular and organizational changes moved beyond the initial targets to have even wider influence. The prior chapters have illustrated the widespread rippling effects of the planned change process implemented by GeroRich projects. However, the expanding and extensive nature of this ripple was not fully anticipated by any of the staff or project directors themselves.

As stated by one project director, *"Aging content has been added to courses that were not targeted by the GeroRich project. The foundation research course now has content on measurement issues for older persons. The advanced course on child abuse and family violence has been revised to include material on elder abuse. Management and practice courses in the Client-Centered Management Sequence of the administration concentration now use at least one case focusing on older persons."*

Another program noted that, *"Although our GeroRich project only targeted the BSW courses, one unanticipated benefit is that these faculty members also infused gerontology content in their first-year MSW courses. Thus participation in the GeroRich project brought about a change not only in BSW course content, but also in faculty awareness of the need to infuse this content in their other courses."*

An in yet another, *"I learned that there has been a hunger for information and resources on aging. Some faculty went beyond the 'Hartford Resources' and sought out resources on their on. This demonstrates a growing commitment of the faculty to continue to include aging-related content, and that if we 'lit the fire,' they would 'fan the embers.'"*

This diffusion of gero content—or the ripple effect—in itself fosters sustainability and institutionalization of change. It also is a reminder or lesson learned that while planned curricular and organizational change is time intensive and often slow, it can yield immeasurable benefits for the key stakeholders within the organization—a lesson that is important for programs to remember as they plan or implement such changes in the future.