Elder Perceptions of Higher Education and Successful Aging

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BOSTON COLLEGE

Lynch School of Education

Department of Educational Administration and Higher Education

Program in Higher Education

ELDER PERCEPTIONS OF HIGHER

EDUCATION AND SUCCESSFUL AGING

Dissertation
by

SCOTT ANTHONY TRUDEAU

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DISSERTATION ABSTRACT

Elder Perceptions of Higher Education and Successful Aging

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There is a growing trend of colleges and universities to affiliate with retirement communities, often to enhance revenue sources. Little is known of the effect of this emerging phenomenon on the aging processes of elders living and learning on a college campus. This phenomenological study used focus group methodology to collect in depth interview data from a group of 31 elderly residents of a college-affiliated retirement community. Residents in this setting are required to complete 450 hours of continuing education per year. This continuing education requirement can be met through either age-segregated classes with other residents; or, intergenerational courses at the college with traditional aged students. The specific aims of this study included understanding the potential effects of the retirement community and campus settings on elders' ability to age successfully; and the impact of intergenerational engagement on the aging process. Findings from this study confirm that there are many opportunities which promote successful aging of elders in a higher education affiliated retirement community. Participants reported that successful aging is enhanced by the safety of the setting and access to: physical care; continuing education; dining facilities; socialization; intergenerational engagement; and the general disposition of intellectualism in the setting. In addition, the educational requirement results in self-selection of residents with interest in intellectual matters and continued learning that is then accentuated within the

community culture. Conclusions include that more institutions of higher education should consider similar models, with careful attention to issues of enhancing both funding sources and opportunities for diversity within the program.

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CHAPTER ONE

Introduction

Normal child and normal adult alike, in other words are engaged in growing. The difference between them is not the difference between growth and no growth, but between the modes of growth appropriate to different conditions. With respect to development of powers devoted to coping with specific scientific and economic problems we may say the child should be growing in manhood. With respect to sympathetic curiosity, unbiased responsiveness, and openness of mind, we may say that the adult should be growing in childlikeness. One statement is as true as the other (Dewey, 1916/1951, p. 59).

Background

This dissertation explores the relationship of higher education to older adults. At first glance, many may consider this an unnatural pairing. Some may even consider the discussion of higher education and older adults to be strange bedfellows. This impression may be due to the fact that there persists in our society, a level of ageism that often stereotypes elders as frail, closed minded, socially isolated, and financially strained (Angus & Reeve, 2006). Certainly, a population of feeble-minded elders would have no use for higher education. Yet these stereotypes do not accurately reflect the trends within this population (Achenbaum & Cole, 2007; Manheimer, 2003). The United States (U.S.), and the world, is facing profound demographic changes as the population ages and life expectancies increase. By 2050, the proportion of older adults in the world (30%) is expected to exceed the proportion of children (18%) for the first time (Harrison & Tsao, 2006). In the U.S., Manheimer (2003) suggests that there has been a 'democratization' of adults post retirement age, giving rise to increasing demands for educational opportunities in elders. "Fueling the demand is a new generation of retirees who are more affluent, better educated, and healthier than any previous generation in American history"

(Manheimer, 2003, p. 212). This relative health and wealth of today's older Americans contributes to the trend of older adults living longer, with expanded life expectancies.

Achenbaum and Cole (2007) describe the implications of expanded life expectancies as manifold, impacting all age segments of our population. Consistent with Martínez Alemán's notion that, "Democratic societies, then, must ensure a full range of opportunities for the development of individuals, their thinking, and their intelligence" (2001, p. 386), there are calls from many fronts for rethinking existing policies and entitlements to support successful aging (Achenbaum & Cole, 2007; Binstock, 1997; Dychtwald, Erickson, & Morrison, 2004; Foner, 2000; Hudson, 2007; Kressley & Huebschmann, 2002; Nusberg, 2000). Yet we know very little about the role that higher education may play in supporting the successful aging of our expanding elder population.

Purpose of this Study

This qualitative study is designed to explore the phenomena of higher education and successful aging using focus group methodology. The focus of this research is to explore the interaction between elders and the context of higher education. This research is exploratory in nature, for the purpose of elucidating the specific factors within a higher education context that impact the ability of elders to age well. The use of phenomenological methodology is highly desirable in this study to enrich our appreciation of the lived experiences of elders aging in the context of higher education.

Specific Aims and Research Questions

The specific aims of this study are two pronged. First, this research seeks to increase understanding of the role that the context of higher education plays in elders'

ability to age successfully. In order to satisfy this aim the research describes the attributes of the higher education context that elders value. This study also explores the opportunities that a college campus offers to promote engagement and well-being in elder residents. Special attention is paid in this study to the impact that engagement in continuing education in late life has on elders. Specifically, how does a requirement for on-going educational pursuit provide support or challenge successful aging in a higher education context?

The second main aim of this study is to explore older adults' use of intergenerational versus age-segregated educational activities. Inherent in exploring these two forms of educational engagement will be to describe differences in outcomes from intergenerational and age-segregated educational activities. This aim is addressed by answering the essential question, how does intergenerational or age-segregated educational pursuit affect perceptions of successful aging for participants?

Theoretical Framework

The factors affecting this research are complex and multifaceted by nature. As such, it is difficult to find a single theoretical model to guide this study. Two over arching assumptions that must be satisfied by the theoretical perspective are that: 1.) aging processes are modifiable, thus not genetically pre-scripted and inalterable; and, 2.) aging is a developmental process incorporating both gains and losses. As I reviewed the vast literature considering various guiding frameworks, I decided that an integrated model would best satisfy these two principles. As such, this study uses Rowe and Kahn's conceptualization of successful aging and Tornstam's model of gerotranscendence.

Successful aging. Demographic changes suggest that a large segment of the population in the U.S. will need increased resources to age gracefully (Manheimer, 2003; SeniorJournal.com, 2005). Rowe and Kahn (1997) defined successful aging as reflected in individuals who: have a low chance of developing a disability and the risk factors associated with it; are functionally capable (both cognitively and physically); and are actively engaged in life. However, there is a lack of information available to elders about concrete ways to support aging successfully. With the manifestation of the human genome project, our society has increasingly ascribed emphasis to the biological predictors of health. Many believe if their parents died of heart disease, or developed Alzheimer's disease, there is nothing they can do to prevent themselves from developing the same ailments. Research is growing that demonstrates that this does not have to be true. For instance, Rowe and Kahn (1997) found that many factors contribute to aging successfully, and that pathology is not a normal part of the aging process. They further suggest that engagement in meaningful activity helps an elder stay active and physically healthy, and promotes healthy cognitive functioning. Thus, in this dissertation I conceptualize successful aging as a multifaceted construct, impacted by many factors. Extant literature also suggests that one way to measure successful aging in the elder population is to use the overarching construct of subjective well-being (SWB). Ryff, Singer, and Dienberg Love (2004) define subjective well-being with three key elements: life satisfaction, the presence of positive affect, and the absence of negative affect. This multi-factorial approach to defining SWB expands on Rowe and Kahn's (1997) conceptualization of successful aging, and is used throughout this study to interpret

participant perceptions. One area that is notably absent from this theoretical orientation, is the role that spirituality may have on elders' perceptions of successful aging (Crowther, Parker, Achenbaum, Larimore, & Koenig, 2002).

Gerotranscendence. The theory of gerotranscendence (Tornstam, 1989, 1997, 2005) recognizes the complexity of factors that contribute to successful aging and provides a new theory of development to understand this stage of the life span more fully. Gerotranscendence is in direct opposition to the previous theoretical orientation that conceptualized senescence as a process of disengagement from the world (Dean & Newell, 1961). While needs for material and social connections may change, Tornstam conceptualizes this as a developmental progression rather than a process of giving up or shutting down. He challenges the field of social gerontology to consider a major paradigm shift away from previous conceptualizations of the hardships of aging, to a more positive orientation.

> The enlightened maturity which, at very best, accompanies the process of aging, or rather the process of living, might be described as a shift in metaperspective – from a materialistic and rational perspective to a more cosmic and transcendent one, normally followed by an increase in life satisfaction (Tornstam, 2005, p. 40 - 41).

The theory of gerotranscendence interprets elders' turning away from middle-adult values and priorities as a positive developmental process, rather than pathologizing such re-orientation. Consistent with models of subjective well-being, the outcome of such development is enhanced life satisfaction.

Thus, similar to the Zen Buddhist who transcends the earthly demands of a material world; older adults too have the opportunity to transcend the preoccupations of earlier developmental stages. Tornstam (2005) describes this transcendence for elders in terms of changes in cosmic (i.e. time orientation, attitudes about life and death, etc.), self (i.e. increased altruism, decreased preoccupation with the body, etc.) and, social relationship (i.e. enhanced innocence, closer circle of friends, etc.) dimensions. Tornstam cautions that this theoretical approach does not apply uniformly to all elders. "We should rather talk about it as a developmental possibility, where the precise form of the gerotranscendence can differ from individual to individual" (Tornstam, 2005, p. 75). This theory is important in this study as it challenges my own biases through the interpretive process, by providing another lens and perspective by which to consider the findings.

The theoretical orientation of gerotranscendence does have direct implications for considering the success of elders moving through this stage. One must be careful not to measure the success of the Third Age by standards of productivity etc. used in the Second Age. This measurement conundrum supports the exploratory nature of this research, giving voice to the perceptions of participants, rather than attempting to impose a value-laden scale of measurement on them. In fact, Tornstam (2005) recommends that understanding the developmental progression of elders requires a "…different research effort whereby the elderly cease to be research objects and instead become co-creating subjects….the phenomenological research effort comes to the fore" (p. 29). This perspective is in complete accord with the design of this research project.

An integrated theoretical model. The successful aging model described by Rowe and Kahn (1997), in combination with Tornstam's (2005) developmental theory of gerotranscendence, will serve as the theoretical foundation for this study and data analysis. As the intersections of elders and higher education are explored, the benefits of physical and mental health, activity and social engagements will be important to consider in the descriptions of elder participants. I exerted much effort not to superimpose the standards of productivity and engagement from earlier developmental stages. This was made possible by continually considering the possibility of gerotranscendence as the findings were interpreted. Thus, using the dual lenses of successful aging and gerotranscendence allowed for a more comprehensive interpretation than would have been afforded by either theoretical perspective in isolation.

Significance

This research is both timely and important as our society approaches unprecedented demographic shifts in our population. Understanding the multiple factors that contribute to an older adult's ability to age well has important potential for promoting individual success, while also having multiple social policy, quality of life and research implications. This section introduces many of the factors that contribute to the significance of this study.

The role of education in a democratic society. Human beings are continuously developing and evolving across the lifespan. This development can be facilitated or limited by opportunities that challenge the status quo (Lawton, 1980), education is often

the source of such challenges. This correlation between education and development is seen in the writings of progressive educator and philosopher John Dewey.

> When it is said that education is development, everything depends upon *how* development is conceived. Our net conclusion is that life is development, and that developing, growing, is life. Translated into its educational equivalents, this means (i) that the educational process has no end beyond itself; it is its own end; and that (ii) the educational process is one of continual reorganizing, reconstructing, transforming (Dewey, 1916/1951, p. 59).

The social condition for the flexible adaptation that Dewey believed was crucial for human advancement is a democratic form of life. This lifestyle is not guaranteed merely by democratic forms of governance. Democratic life is perpetuated by the inculcation of democratic habits of cooperation and public spiritedness. Thus, democracy requires a self-conscious community of individuals responding to society's needs. Dewey believed that this responsiveness is most effective when marked by experimental and inventive problem solving, rather than merely relying on dogmatic solutions. According to Dewey, the school should be viewed as an extension of civil society and continuous with it, and the student encouraged to operate as a member of a community, actively pursuing interests in cooperation with others. From this perspective then, as our civil society ages, we must consider how this is reflected in our educative process.

   Intergenerational engagement. One way that this aging society interfaces with education is through intergenerational programs. Programs and pedagogy can vary

greatly by design, encompassing virtually any structured exchange across age groups. Kaplan, Liu, and Hannon (2006) suggest that there has been a recent shift in the concept of intergenerational programs, away from merely a structured exchange across generational lines.

> A qualitative shift in understanding intergenerational activities can be seen in the definition provided by the newly established International Consortium of Intergenerational Programs (based in the United Kingdom with the constitution and incorporation occurring in the Netherlands): "social vehicles that create purposeful and ongoing exchange of resources and learning among older and younger generations" (Kaplan et al., 2006, p. 407).

This shift in perspective seems to better capture the complexity and reciprocity of intergenerational learning, and is quite consistent with Dewey's conceptualization of the educational benefit of experiential learning opportunities.

Lifelong learning. Similar to his developmental conceptualizations of the student and learner, Dewey ascribed a fluid conceptualization to the notion of truth. Essential to his perspective is that it is void of any transcendental or eternal reality. Truth therefore is not a static concept to be acquired, but rather an evolving process to be enacted. In so much as truth is not a tangible item but much more of a process, a pluralistic phenomenon, pragmatic reform embraced industrial training, agricultural and social education, and educational theorists' new instructional techniques. The progressives insisted that education be a continuous reconstruction of living experience, with the

student the center of concern. Dewey maintained that schools should be more reflective of society at large, albeit seamless extensions of society. Essential to this is the admittedly controversial idea that adults can and should continue to engage in education. Education as a continuous process is reflected in Dewey's early writings, "…the result of the educative process is capacity for further education stands in contrast with some other ideas which have profoundly influenced practice" (1916/1951, p. 59). This notion sets the stage for the present day phenomenon of lifelong learning.

The concept of lifelong learning is actualized in adult education through a variety of means including career development and professionally related continuing education, traditional degree programs, hobby and leisure classes, and recently includes distance learning and internet courses (Manheimer, 2003). Approximately 300 Lifelong Learning Institutes (LLIs) are affiliated with college campuses throughout the U.S. Brady, Holt, and Welt (2003) note that LLIs are typically either professionally managed by the host institution or are more member governed and run. These authors note that, "Despite its importance in the growing field of senior adult education, there has been surprisingly little research thus far on the experiences of peer teaching in Lifelong Learning Institutes" (Brady et al., 2003, p. 852). Peer teaching as we will see is one component of program at the site of this study.

Research void in adult education. Manheimer (2003) posits at least one potential explanation for the paucity of relevant research in adult learning in the following quote:

Again, because older adult education does not fall into one academic

discipline but overlaps several and is marginal to all, opportunities to

prepare for professional careers in the field are lacking. There is a great

need for curricula to help prepare planners, administrators, and

educational facilitators of older adults that incorporates the latest research

findings on cognitive and emotional development in midlife and old age.

The pedagogy of older persons, sometimes called andragogy or

"gerontagogy," needs to be infused into both adult education degree

programs and social gerontology. Ensuring high quality programs remains

limited to counting enrollments rather than utilizing professional

assessment techniques (pp. 215 - 216).

This dissertation represents an effort to begin to bring together many margins to coalesce

around the topic of adult learning and the role of the college campus setting as they relate

to successful aging.

The one thing that is remarkably clear is that Dewey's conceptualizations about

education are not at all inconsistent with a call to consider the role that education (namely

higher education) has to play in providing for the social good of elder citizens in our

democratic society. It seems that the essential question posited by Guttman (1987)

remains salient to our discussion – what is the purpose of higher education in our

democratic society? To expand her question a bit further, how does the purpose of higher

education adapt to profound demographic changes within our society? French sociologist

Emile Durkheim suggested that, "Education is above all the means by which society

perpetually recreates the conditions of its very existence" (1956, p. 123). This supports

the idea that in order to cope with the profound demographic shifts looming in the near

future, the U.S. will do well to look to the social institution of higher education to help address the new demands of an aging population that is larger, healthier, and wealthier than any previous generation of elders. This sociologic perspective warrants further discussion.

Sociological perspectives. The institutions, laws and policies that serve to organize our democratic society are continuously under pressure to adapt to ever changing demands. Yet, often these institutions that are intended to serve the population, are ill conceived or based more on political agenda than on meeting the needs of elders. Bernice Neugarten (1982) criticized the practice of policies based on age rather than need. She had the audacity at the time to challenge us to consider the possibility of an age irrelevant society. We see elements of this policy dilemma in the present debate over older drivers. Essential to this debate is the argument that you cannot arbitrarily set an age for retesting older drivers. This argument is supported by the complexity of functional issues necessary for successful driving. Setting an age based policy for retesting will burden functional drivers and potentially miss the drivers of most concern. Within this notion lie important conceptual shifts that are becoming more necessary as the aging population of baby boomers prepares to challenge most of the existing social structures in place for elders. Historically, social scientists have attempted to simplify the developmental trajectory to support social order and predictability, one of these conceptualizations is the notion of the three boxes of life.

In short, the three boxes include first youth's pursuit of an education, then adults' working and earning a living, and ending with a life of leisure in old age (see Figure 1).

Figure 1

Transitioning from Age-Segregation to Age-Integration

AGE-SEGREGATED   AGE-INTEGRATED
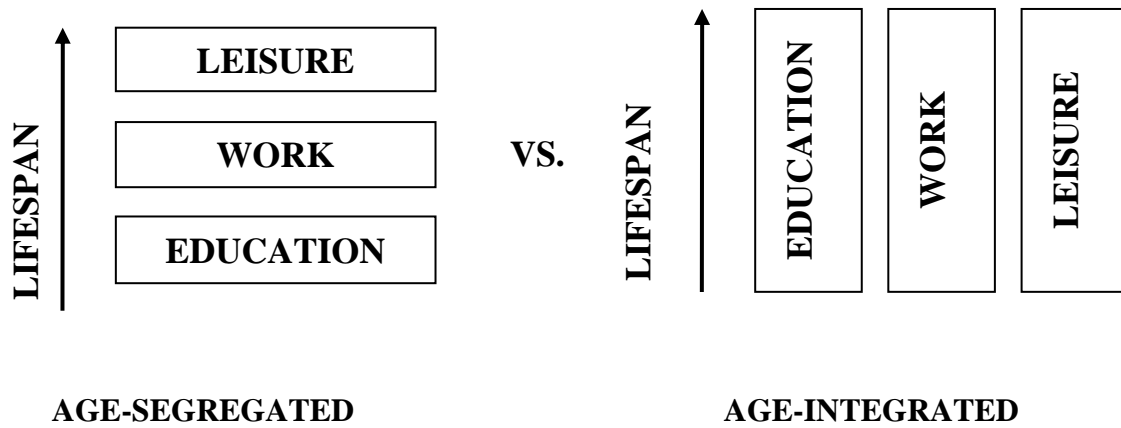
The Three Boxes of Life framework was defined by John Bolles (1978) in a best seller by the same title. Achenbaum and Cole (2007) relate the relevance of the three boxes to older adult education in the following passage:

> The first box of life caters primarily to children and youth, but since
> colonial times there has also been a genuine effort to attend to the
> educational desires and needs of men and women beyond the first quarter
> of life. Population aging and the constant need to facilitate workers'
> efforts to keep apace of organizational and technological changes in the
> marketplace will put added pressure on public and private agencies to
> develop continuing education programs and to allocate resources to
> benefit older workers. The importance of education does not end when the
> young exit the first box of life. It persists over the life course (p. 248).

The importance of expanding our conceptualization of the boxes is also reflected in an international document published by the American Association of Retired Persons (AARP) titled *Strategies for a Society for All Ages.* One of the key recommendation of this report is that global social institutions should, "Promote easier transitions throughout the lifespan between periods of education, work and leisure" (Nusberg, 2000, p. 35). This seeming disconnect between the theoretical description of the three boxes, need based policies and older adult practices is addressed by Matilda White Riley in her description of an age-integrated social order.

Age-integration. Sociologists have historically viewed individuals across the life span as occupying roles and activities compartmentalized into the three boxes of

education, work, and leisure. This approach suggested that education occupies the young

in all forms of educational activities. Once completed with education the young adult

embarks on a career to work for the middle adult phase of life. Thus the older adult is

relegated to remain preoccupied with leisure time throughout the retirement years.

Age-integration theory challenges the construct of the 'three boxes of life' (see

Figure 1) being specific to assigned age groups (Uhlenberg, 2000). The three boxes

model is rendered irrelevant by the vitality of the older adult population. As stated earlier

the shifting demographics of our aging population and the relative health and wealth of

contemporary older adults is unprecedented. Age-integration proposes an approach that

transcends the traditional staging of education, work, and leisure to see the importance of

all three areas across every aging life span (Dannefer, Uhlenberg, Foner, & Abeles, 2005;

Riley & Riley, 2000). Again the potential global benefits of age-integrated societies are

reflected in the AARP *Strategies for a Society for All Ages,* noting that countries should:

> **(In the area of education)**

- Provide affordable access to basic education, literacy training,

    vocational training, adult and other lifelong learning opportunities for

    all groups in society regardless of arbitrary characteristics such as age,

    gender, ethnicity, disability, or religion (Nusberg, 2000, p. 34).

Within the theory of age-integration, Riley & Riley (1994) introduced a process

of structural lag suggesting that in the face of significant change our social institutions

take time to adjust. One area that seems to be lagging is the role of higher education to

address the needs of an aging citizenry. Demographic shifts and a healthier cohort of

elders come together to demand adjustments on the part of social structures. This has resulted in pressures to propel the expansion adult education opportunities and the development of an extensive elder care and elder housing market.

The advent of the Third Age. The massive demographic shifts in our society are giving way to a cohort of individuals historically in the post-retirement, leisure stage of their life, who are not interested in retiring – at least not in the traditional sense. Laslett (1991) used the term the Third Age to describe this group of healthier and wealthier, post retirement aged individuals. This cohort is continuing to expand, and so too is their need for opportunities for personal fulfillment (James & Wink, 2007). Personal fulfillment may be achieved through continued engagements, albeit potentially restructured, with work activities, leisure pursuits, or as is the focus of this dissertation, educational participation.

Elder housing market. There is one, often tacit, premise underlying the advent of the elder housing market boom, that environment matters. One of our foremost gerontologists supports this stating, "a person's behavioral and psychological state can be better understood with knowledge of the context in which the person behaves" (Lawton1980, p. 2). It is important then that we consider the types of environments being marketed to older adults. Cavanaugh and Blanchard-Fields (2002) suggest that there are predominantly three types of long term care facilities including nursing homes, assisted living facilities, and adult foster homes. Nursing homes provide the most intensive care of the three, including 24 hour nursing care. Assisted living facilities are typically smaller than nursing homes, and provide some level of assistance with personal care but there is

less skilled care available. Adult foster homes are typically small residential settings with limited access to skilled care. These authors fail to acknowledge that there are a large number of elder housing options without services ranging from posh gated over 50 communities to large urban subsidized elderly apartment complexes.

Continuing care retirement communities. In addition, there has been the advent of many Continuing Care Retirement Communities (CCRCs, Horwitz, 2001). Typically, CCRCs provide a range of services from the long term care continuum. They may have independent living apartments, assisted living residences, dementia specific care, and nursing home care available on site to limit the upheaval necessary for moving the elder as their care needs change, supporting the concept of aging in place. To date, access to CCRCs has been limited to the relatively wealthy since entry fees and monthly rent/service fees preclude individuals without means. Additionally, residents of CCRCs are typically three times more likely to be female (Himes, 2002). Excepting some commercial long term care insurance plans, traditional Medicare/Medicaid plans do not subsidize CCRC residents, until they require nursing home level of skilled care either for rehabilitation of an acute medical need, or long term skilled nursing placement. We can anticipate that the relative exclusivity of this trend will likely be challenged as the population increases and demands rise for equal access.

Trends and challenges in higher education. It could be argued that the winds of change blow weakly in American higher education, yet it would be misnomer to suggest that these are gentle breezes. Gill (2000) summarizes that, "Higher education governance is not an arena in which causes and effects can be clearly identified through carefully

controlled experiments. Institutional change generally happens piecemeal and at the margin, rather than systematically; pure models of reform are rarely available for evaluation" (p. 47). Throughout the history and the evolution of our higher education system, there have been tumultuous periods leading to substantive change and innovation. These periods however, are interspersed with long episodes of apparent inertia and stagnation, giving the impression that change is not only difficult but perhaps impossible within the academy. We may well be facing a period in our history that will demand aggressive change and creative innovation in higher education.

Financial resources and state support of American higher education pose a major threat to higher education (Ehrenberg, 2000, 2006; Ehrenberg & Rizzo, 2004; Kane, Orszag, & Gunter, 2003). Kane et al. (2003) explore the impact that expanding Medicaid costs (entitlement for elders mostly) have on state subsidy of public higher education (impacts young adults mostly). As state legislators attempt to control expenditures, they must recognize that the swelling elder population will place ever more burden on the Medicaid system, most of this burden is anticipated in the areas of prescription drug benefits and long term care (Kane et al., 2003). The implications of these funding concerns have resulted in increasing tuition and fess well above the rate of inflation, limited access, decreases in tenure and tenure track faculty, threats to educational quality, and declines in PhDs produced in the U.S. (Ehrenberg, 2000, 2006; Ehrenberg & Rizzo, 2004). Declining PhDs coupled with an aging faculty anticipating retirement raises grave concerns about the future quality of higher education.

However, Ehrenberg and Rizzo (2004) suggest that,

Protecting the quality of higher education and increasing access to it are

not mutually exclusive goals, and we simply cannot afford to treat them as

such. Nor can we afford to ignore either of these important goals. Policy

makers and taxpayers alike would be well advised to pay attention to the

issues that we have raised…(p. 30).

In spite of the fact that the population of young adults is decreasing in proportion to

elders, there continues to be high demand for higher education from traditional-aged

students (Ehrenberg, 2000). Despite demand, the increasingly competitive corporate

environment in higher education, make it difficult for small private colleges to survive

without diversification of revenues (Ehrenberg, 2000, 2006; Ehrenberg & Rizzo, 2004;

Halligan, 2004; Harrison & Tsao, 2006). Technological advances, the rise of for profit

institutions like the University of Phoenix, and distance learning options have all helped

to significantly reconfigure the landscape of higher education, offering the opportunity

for alternative use for existing property and capital portfolios (Harrison & Tsao, 2006;

Manheimer, 2003).

Political implications of tight resources. The inherent conflicts between programs

for elders and higher education funding, raise many questions. Is the purpose of aging to

become a dependent class of individuals draining the resources of the society? Or, is

there continued need to evolve our definitions of citizens to include the active vital

contributions to democracy made by individuals over age 65? Some authors (Binstock,

1997; Day, 1992) suggest that the lack of a shared social value across age cohorts in our society may result in political age stratification.

Older citizens would potentially be pitted against the needs of younger groups, resulting in sparse resources being divided up amongst political groups on the basis of age. Again, we have been strongly forewarned by Neugarten (1982) against policies that are age-based rather than need-based. Do we invest our resources in education for the young, or entitlements for the old? It seems to me that this potential discord is very dangerous to the integrity of a social democracy, supporting the need for consideration of a more integrated approach to the issues. Yet more integrated solutions will require unprecedented creativity and research to assure that needs of both higher education and elders are being adequately addressed (Ehrenberg, 2000, 2006; Ehrenberg & Rizzo, 2004; Kane et al., 2003). Achenbaum and Cole (2007) write, "Insofar as life-long learning requires a lifelong investment, education should be accessible and affordable to the entire population. Needs and levels of training vary by age, though they tend to be cumulative in nature" (p. 265). Yet finding resources to devote to lifelong learning in view of competing priorities seems daunting at best.

Opportunities for intersections of elder care and higher education. Manheimer (2003) notes that the single highest predictor of pursuing further education is educational level. In addition to being healthier and wealthier than ever before, today's elders, and the impending baby boomers, are better educated than previous generations. This high educational level will serve to drive expectations for access to continuing education for this cohort. This demand is reflective of a general sense that consumerism is on the rise in

our culture. Consumerism gives rise to an interaction that seems particularly poignant and obvious, the commercialization of both education and elder care.

While there may be an obvious need for social institutions to be established or enhanced to tend to the needs of our aging population, it is clear that we have gone overboard in many ways. Preying on the negative conceptualization of aging to sell more beauty creams and herbal supplements. The capitalistic gains of the few are fueled in decidedly undemocratic fashion. It is further predicted that as the baby-boomers age, this capitalistic mentality will be punctuated with entitlement and demands for services (Dychtwald et al., 2004). "This retreat from an associated individual to an autonomous, atomistic, self-fulfilling individual gave rise to a doctrine of "individualism" that held the rights and interests of the discrete, unassociated individual as primary" (Martínez Alemán, 2001, p. 387). Our obsession with youth and autonomy shuns the frailties of our aged, presenting many obstacles to their full engagement in society and, by extension, educational opportunities.

The partnering of higher education and the elder care market may be directly reflective of the needs for colleges, especially small privates, to diversify their revenue streams (Harrison & Tsao, 2006). From a more altruistic perspective it may also be possible to develop, "university-linked learning-centered communities that provide additional opportunities for universities to capitalize on their resources and expertise while contributing to the surrounding community" (Harrison & Tsao, 2006, p. 21).

In the U.S. there are currently approximately 60 college-linked retirement communities, each having a variable strength of connection to the host institution

(Halligan, 2004; Harrison & Tsao, 2006). Existing programs may be considered trend

setters by, "Recognizing the social challenges resulting from increased longevity, [some]

universities are attempting to develop new models for retirement and lay the foundations

for attitudinal change" (Harrison & Tsao, 2006, p. 24). University Business (a publication

for university presidents and administrators) published an article in 2004 espousing the

benefits of developing an elder care community affiliated with colleges. In this article,

Halligan (2004) suggests that there is one primary reason for colleges to consider

developing a university linked retirement community (ULRC):

> Revenue. Whether you earn revenue by selling or leasing vacant land, or
>
> form a partnership with a developer, or even license your school name to a
>
> developer, the bottom line is that such investments can add significant and
>
> recurring sources of revenue (p. 1).

As diverse as the potential sources of revenue are, so too are the business plans for such

settings. They can range from non-profit to for profit, from close relationships with the

host school to connections in name only (Halligan, 2004; Harrison & Tsao, 2006).

As previously identified, some existing pedagogy supports intergenerational

activities, often through service learning projects. Krout and Pogorzala (2002) identify a

trend toward planned opportunities for interface of students with elders when proximity

and concentration is available:

> The growth of residential options, such as retirement communities,
>
> assisted living, and continuing care retirement communities…for older
>
> adults, and the emerging trend of such facilities to locate in college towns

have increased the opportunities for these student/older adult interactions

(p. 853).

In addition to opportunities for intergenerational access, Achenbaum and Cole's (2007) vision of the potential for elders and higher education to contribute to a more productive society, is consistent with opportunities for enhanced personal fulfillment in the Third Age:

The educational needs of elderly workers offer a variation on this theme. Given the likelihood that there will be greater part-time, flexible opportunities for those who are "unretired," it makes sense to offer senior citizens practical courses so that they too may retool and acquire greater technological competency. Corporations and institutions of higher learning might also seize on the wisdom of age by offering select employees an opportunity to mentor younger workers (p.262).

While these potential opportunities for restructuring and reorganization may seem self evident, it is critical to remember that the process of structural lag will contribute to the social inertia around such major revisions to our social order (Riley & Riley, 1994).

Lasell Village as a model of the intersection of elder care and higher education. One program that seems to be pushing the envelope of institutional innovation is Lasell College. Lasell has developed a CCRC, sited directly on campus and fully integrated into the organizational structure of the college. Lasell Village (the Village) opened in 2000 and provides approximately 210 residences for elders on the campus. Services range from independent living through nursing home level of care. It appears that as a small, private,

undergraduate school, Lasell College faced many of the financial challenges outlined above. The Village seems to be a way for the institution to diversify its revenue, by capitalizing on existing building and real estate. One unique aspect of this program is that the residents of the Village are required as a term of their lease to participate in a minimum of 450 continuing education hours per year. There are a variety of ways that residents can meet this requirement. They may participate in structured intergenerational coursework on the main campus (with traditional-aged students), or participate in more segregated opportunities with classes offered within the Village. There is a Dean devoted solely to managing the programs of the Village. While some may suggest that the elderly and higher education make strange bedfellows, the Village embraces the forces of higher education and aging in ways that are, as yet, unprecedented.

This study will capitalize on the Lasell experience by exploring how elder residents perceive the practice of integrating aging and higher education. The focus of this study will be to hear from elders living within the context of higher education, how lifelong learning contributes to their ability to age successfully. Of particular interest in this project is to begin to explore if elders describe a difference between age-segregated learning and intergenerational learning.

Design

This qualitative study uses intensive focus group interviews from six focus groups to consider participants' (n = 31) perspectives on higher education and successful aging. Phenomenological methods were employed to interpret the data and describe the lived experience of participants. Participants were recruited from the general population of

residents at Lasell Village. All Village residents had the opportunity to volunteer to participate. Participants self identified as either taking age-segregated (four focus groups) or age integrated (two focus groups) classes to populate the groups. Focus group audio recordings were transcribed and analyzed using HyperResearch software.

Limitations. The primary limitation of this study is that this sample is relatively homogeneous and advantaged. Yet, understanding the factors that contribute or interfere with age-integration in a higher education context will be invaluable to developing future models with more diverse populations. Additionally, because the sample was completely voluntary, there is the potential for a disproportionate representation of residents with positive attitudes about the facility.

Personal factors. As an occupational therapist for the last 20 plus years, I am profoundly aware that all activities are complex interactions between the individual engaging in the action, the activity itself (tools, materials, etc.), and the context within which the activity takes place. Law and colleagues (1996) describe this theoretically as a necessary transaction between the person – environment – and occupation (PEO) in order for functional performance to be possible. When we consider aging, much emphasis is placed on providing the 'right care, in the right place, at the right time' with little regard for specific strategies that might enhance or improve the aging experience. Shifting demographics, especially the coming of age of the baby boomer cohort, place new demands in the U.S. for social structures that promote successful aging. The focus of this dissertation will be to look at the impact that the context or environment has on the occupation of successful aging.

Conclusions

This chapter reviews a confluence of factors that justify the timeliness of this research. First, the site, Lasell Village (the Village) is unique and affords this research an unprecedented population for study. I know of no other college affiliated retirement community that requires, and tracks, the elder residents to maintain an active commitment to educational pursuits. My background as an occupational therapist uniquely positions me to explore the complexity of factors that might influence older adults' ability to thrive within the context of higher education. Pressures on campuses for revenue diversification and the social demands of a changing demographic all align to make this project timely and necessary.

To meet the ever-pressing changes in our demography and social order that the aging of our population presents, it seems that institutions such as higher education will be called on to adapt to meet the social need. James and Wink (2007) suggest that the social need for, "new institutions and social structures may well be true; it may be that we need a lot more in the way of social policy, organizational changes, and new institutions" (p. xxii). They go on to caution however that, "The trouble is, with a few exceptions, such claims are being made in the absence of empirical data. We need to know more before such costly recommendations are implemented" (p. xxiii). This research will help us to begin to explore the potential challenges and benefits of higher education engagement in the Third Age, contributing further basis for future policy and program decisions.

This study raises important questions regarding access to higher education within our democratic society. We must consider the potential for greater age-integration within higher education, and shift the paradigms within our culture to value and respect the adult learners' needs and contributions within the classroom. This shifting paradigm will begin to help promote the value of all elders within our democracy. Sweeping review of social structures in light of our common values and priorities (ethics) will allow the potential for considering the purpose and place of each institution before implementation of innovations. While this is perhaps the ideal – it may be too utopian a perspective. It does seem clear however, that there will need to be some manner of social reorganization in our future. The findings from this research will serve to inform policy and planning decisions related to the role of higher education in meeting the needs of elders in our society. Without a foundation of studies like this to describe the potential variables, we will be unable to plan future innovations creatively and effectively.

Overview

In the following chapters, the reader will gain a deeper appreciation of the issues pertinent to this study. In Chapter Two, many of the issues raised above will be explored in fuller detail. Chapter Three details the study design and the methodological processes employed to complete this research project. Chapter Four addresses the findings that pertain to how the context of a continuing care retirement community and higher education influences the aging processes of participants. Chapter Five presents findings related to the participants' perceptions about the factors that influence intergenerational

engagement within this context. Chapter Six synthesizes the findings and presents the

implications that relate to research, practice and policy issues.

CHAPTER TWO

Literature Review

The United States has experienced a tremendous increase in the segment of our population over age 65. Over the course of the 20th century people over 65 expanded nearly twelve-fold from 3 million to 35 million individuals. Evidenced by the government report in 2008 (*Older Americans 2008: Key indicators of well-being*), the sharpest increase is in the group over age 85 which rose from just over 100,000 in 1900 to 5.3 million in 2006. In addition to the relatively rapid growth of this portion of our population, projections suggest that growth will continue to increase over the coming years.

By 2030, it is estimated that the population over age 65 will more than double to an unprecedented 71.5 million. This large growth over the next 25 years is largely due to the aging of the baby boomers. The first of the boomers born between 1946 and 1964, reached 62 in 2008 and became eligible for social security benefits. These individuals will begin reaching retirement age of 65 in 2011 (*Older Americans 2008: Key indicators of well-being*, 2008). Another important, yet contrasting demographic trend, is the relative shrinking of the post baby boom cohort.

Many have suggested that existing social structures are ill prepared to respond to the evolving needs of our aging society (Dychtwald et al., 2004). Opportunities for housing, healthcare and even purposeful activity alternatives are all potentially going to be challenged by the demands of this expanding portion of the population. Since this

growth is unprecedented, our society is certainly charting a new course in yet unexplored waters.

The Future of Retirement

Changes in the reorganization of our society have an impact on the individuals within the U.S. A demographic survey in Massachusetts mirrors national trends (Hugick, Sumners, DiAngelo, Ansel, & Leiserson, 2005) and goes on to suggest that many of the individuals of the baby boom generation plan to work and remain productive after the age of 65. Described by Wink & James (2007), "living to old age is becoming a normative expectation, without the aura of survivorship it carried years ago" (p. 305). More and more older adults are looking into their futures post retirement without a clear sense if they are looking at 10, 20, or even 30 more healthy years. This brings with it the challenge of figuring out how to maintain meaningful participation in society. Results from a survey on perceptions of aging claim that at least a significant minority of Americans over 85 years of age are healthier, wealthier and more socially connected in comparison to those from any preceding generation (Cutler, Whitelaw, & Beattie, 2002).

Considered by many to be a change agent, higher education can be called upon to shift with these demographic tides to promote successful aging and ultimately promote age-integration in the college environment. The institution of higher education may be well suited with a variety of amenities available for cultural, fitness, and educational engagement within a self-contained venue to address many of the needs of this relatively new segment of our aging population. This need will be further highlighted by the

consumer orientation of the boomers, demanding access to adult education and other productive outlets (Dychtwald et al., 2004; Manheimer, 2003, 2005, 2007).

Successful Aging: A Developmental Process

Laslett (1991) identified, from the perspective of a demographer, that this wave of older adults was coming, suggesting that it would require some redefinitions of accepted practices and conceptualizations. He used the term Third Age to describe this cohort of elders, arguing that they would be more numerous, healthier, and more productive than any previous generation. Interestingly, the term 'third age' is used to describe a program of lifelong learning for senior citizens in France, the University of the Third Age. Similar to Matilda White Riley, Laslett (1991) suggested that: the first age is preoccupied with dependence and the need to be nurtured; the second age focuses on productivity and successful performance; the third age orients towards activities which enhance personal fulfillment; and the fourth age copes with issues of death and dying. Thus, it becomes of utmost importance that we find ways to support the meaningful engagement of 'third agers' in society in order to promote successful aging. However, James and Wink (2007) emphasize that there is a serious paucity of research available to allow for informed social reorganization.

The process of aging has been extensively studied with some theories defining it as a series of distinct and, in some cases, disconnected life phases. Other theories view the aging process in the context of the entire lifespan and thus present it as the natural continuum of human development such as gerotranscendence (Tornstam, 1997, 2005).

Given the influence of the human condition, it is profoundly difficult to view life as a series of clear cut stages (Achenbaum & Cole, 2007).

A Review of Successful Aging Theories

The frequently criticized disengagement theory by Cumming & Henry (1961), developed following a study of adult life in the 1950's, was based on the assumption that older people withdraw from society in preparation for death. Likewise, in response to elders' tendency to withdraw, society disconnects from the aged. Retirement and widowhood were considered indicators of the disengagement process. According to Manheimer (2005), this theory reflected the commonly held assumption of the time that older people had very little or no need for continued education. The theory was quickly attacked as neither natural nor voluntary, seeing it rather as a value-laden construct imposed by an ageist society with potential for devastating consequences. Therefore, disengagement was replaced with the belief that older people should be encouraged to stay active and engaged, known as the 'activity theory' (Lemon, Bengtson, & Peterson, 1972).

Thus, the 'activity theory' of aging prompted elders to remain involved in social activities and stay informed in order to function as good citizens. Over the past 3 decades, Laslett's politically savvy third age elders have changed attitudes regarding aging, retirement and the creative use of leisure time, culminating in a dramatic expansion in programs for learners age 50 plus (Manheimer, 2007). While there has been some social activism resulting in expanded availability, few would argue there is enough.

With life expectancy increasing, and health and social care costs rising, intensifying interest surrounds the concept of "successful aging" (Bowling & Dieppe, 2005). There is, however, a contentious debate over the definition of successful aging due to its inherent multidimensionality and applicability across disciplines (Bowling & Iliffe, 2006; Reker, 2002; Rowe & Kahn, 1997). One common theme among successful aging definitions is the ability to adapt or cope with the changing circumstances of life (Bowling & Dieppe, 2005; Fisher & Specht, 1999; Reker, 2002; Stevens-Ratchford & Diaz, 2003). Both Fisher and Specht (1999) and Bowling and Dieppe (2005) characterize the utilization of past experiences as integral in adapting to the challenges of aging. Reker (2002) determined optimal adaptation as maintenance of physical, mental, and psychological health and satisfaction with life, characteristics echoed in the lay definitions of successful aging given by Bowling and Dieppe (2005).

Defining Subjective Well-Being. Subjective well-being is often considered a component of the successful aging of elders. Research conducted on the concept of subjective well-being is extensive with its origins dating back to the late 1950's (Keyes, Shmotkin, & Ryff, 2002). It has been pointed out that defining the term subjective well-being (SWB) is neither an easy nor straightforward task, given that various conceptual approaches can be found within the existing literature on the subject across the lifespan (Kafka & Kozma, 2002). SWB is typically defined in terms of three components: life satisfaction, presence of positive affect, and absence of negative affect (Diener & Biswas-Diener, 2002; Diener & Fujita, 1995; Ryff et al., 2004; Steverink & Lindenberg, 2006). Subjective well-being is sometimes broken down into categories, such as eudaimonic and

hedonic. Eudaimonic well-being refers to personal growth and development as well as purposeful engagement in activity, while hedonic well-being is associated with positive emotions (Ryff, 1989b; Ryff et al., 2004).

Lawton's definition of morale. Morale is a highly relevant aspect of SWB in an aging population. The term morale is difficult to define within the context of an aging population, though many researchers have attempted to do so (Kutner, Fanshel, Togo, & Langner, 1956; Lawton, 1972). According to Lawton, morale is a multidimensional concept that can be used to explain the well being, quality of life, and the overall psychological state in the lives of older adults (Lawton, 1977; 1997; 2003). Morale includes: being satisfied with life and self; acceptance of the inevitability of change; being optimistic and finding comfort; and being content within the environment (Lawton, 1972).

Subjective well-being builds on these basic definitions of morale. In their study relating SWB and locus of control, Gardner and Helmes (1999) describe subjective well-being as congruency with having a sense of purpose in life, personal relationships, perceived potential, and self-determination. Other studies outline the variables that most often predict subjective well-being. One example claims that high self-esteem, internal locus of control, optimism, positive social relationships, extraversion, and a sense of meaning and purpose in life are the key factors (Compton, 2000). In this context, well-being is defined in terms of self-acceptance, purpose in life, personal growth, positive relations with others, environmental mastery, and autonomy (Ryff et al., 2004). Clearly,

while there are overlaps among various definitions of subjective well-being, it can be defined in countless ways.

   Model of psychological well-being. Lucas, Diener, and Suh (1996) described subjective well-being as a multidimensional construct that is composed of both cognitive and affective components as indicated by reports of life satisfaction and happiness, respectively. From this earlier research of subjective well-being came tools to measure these components, such as the Memorial University of Newfoundland Scale of Happiness (MUNSH) which was used to assess happiness (affective component) and the Life-Satisfaction Index (LSI) which measured the cognitive component of life satisfaction (Lucas et al., 1996).

   While research has established subjective well-being as a multidimensional construct with cognitive and affective components, Ryff (1989b; 1989a) has asserted that much of what has been written in the literature is lacking in theory and that many of the tools developed previously to measure subjective well-being neglected important aspects of what she considered to be positive psychological functioning. Ryff (1989b) theorized that well-being was, in fact, a multidimensional construct composed of life attitudes along with life satisfaction and happiness. Based on a synthesis of earlier theoretical perspectives, such as life span development, clinical psychology, and mental health, Ryff developed a multidimensional model of positive psychological functioning and psychological well-being as a theoretical base to guide the development of an instrument to measure psychological well-being in the middle adult and elder years (Ryff, 1989a).

Ryff's work is appealing due to the comprehensive nature of her definition of SWB encompassing six domains relevant to older adults: positive attitude towards oneself (self-acceptance); close and trusting relationships with others (positive relations with others); possessing qualities of self-determination and independence (autonomy); the ability to manage one's life and environment (environmental mastery); a belief that there is value and meaning in one's life (purpose in life); and the capacity to grow and change throughout life, regardless of age or limitations (personal growth) (Ryff, 1989b).

Factors affecting subjective well-being. Multiple studies have explored the multitudinous factors affecting well-being. Because well-being or happiness is such an important value within western cultures, it has garnered researcher attention as an important area of study. Researchers seek to explore the features that contribute to happiness, and it turns out there are many facets that contribute to SWB (Ryff, 1989b). Generally speaking, there appear to be two ways to categorize the studies, those investigating the intrinsic or psychological factors within, and those exploring the extrinsic, or ecological factors that influence well-being. There is great deal of intersection between the two categories, even within distinct studies, because factors affecting well-being are so closely related to mental health, and inevitably address intrinsic aspects of people (Compton, 2000). This further suggests that studying subjective well-being is a complex task, involving complicated psychological and physical factors.

As an example of a more concrete influence on SWB, research conducted into the influence of money on subjective well-being, explores not only finances, but also the

psychological implications of having or not having money. Although correlations were found between income and subjective well-being, the interceding psychological processes involved remains unclear (Diener & Biswas-Diener, 2002). Another seemingly concrete item researchers have studied is the connection between health and well-being. Ryff et al. (2004) postulated that health is more than just the absence of illness, suggesting that high scores on well-being measures are predictors of health rather than ill health in elders.

In a recent study, Steverink and Lindenberg (2006) sought to discover how subjective well being is influenced by changing social networks which are presumed to come with aging. These researchers identified three basic social needs: affection, behavioral confirmation, and status, and discovered that these items continued to be indicators of subjective well-being, despite advancing age and physical loss. This study reminds us that aging often requires the redefinition of social networks, which confirms that the psychological phenomena of adaptation is often unavoidable for many elders (Steverink & Lindenberg, 2006).

Gardner and Helmes (1999) studied the role of internal locus of control as a component of SWB. These researchers examined factors which influence the attainment of goals, identified as an important component of SWB. The researchers found that goal attainment mediates self-directed learning, therefore impacting subjective well-being for elders, suggesting that continued learning contributes to SWB (Gardner & Helmes, 1999).

Another study considered the belief that life is meaningful as the most salient predictor of subjective well-being. This suggested that meaningfulness provides people

with a sense of purpose, control, valuation, and self-worth (Compton, 2000). All dimensions being studied, regardless of how simple or straightforward the variable may appear, elicit complicated results, involving many dimensions of influence.

   Selective Optimization with Compensation. Selective optimization with compensation was developed by Paul and Margaret Baltes and arose as a result of their efforts to identify a prototypical strategy for successful aging. They offer a lifespan development framework model of aging, conceptualizing that a human being is developing throughout his or her entire life and continues to do so throughout old age. Successful late life development requires minimizing negative outcomes and maximizing positive outcomes, balancing the gains and losses that come with age (Baltes & Baltes, 1990; Freund & Baltes, 1998). Aging and development do not necessarily include, by definition, the acquisition of physical, mental or cognitive ailment. Although any acquisition of disability or ailments is not a prescribed part of development or aging, for many people, some decline in health accompanies aging.

   Another foundational idea that contributes to the development of selective optimization with compensation theory is that within the human population, there exists a wide range of variability and plasticity across individuals (Baltes & Baltes, 1990). The skills people have and their ability to adapt to various situations varies greatly from person to person. Plasticity is present because people have large reserve capacities that can be tapped into through learning, exercise or practice such that individuals are often capable of doing more than what they are currently doing (Baltes & Baltes, 1990).

Variability and plasticity are only helpful in as much as the individual is able to adapt because as development occurs into old age. An individual must be able to use the skills he or she has as an advantage and to tap into the existing reserve capacity in order to manage the changes or losses as they occur. The skills of selection, optimization, and compensation are all based on the idea that the individual must be able to adapt and make life adjustments in the face of the developmental challenges of age (Baltes & Baltes, 1990). If a person is unwilling to make some lifestyle adjustments and adapt to changes as they arise, then he or she will not be able to use the strategy of selective optimization with compensation.

The theory of selective optimization with compensation (SOC) is consistent with both the age-integration and the successful aging constructs (Baltes & Baltes, 1990). It serves as a useful lens to integrate both perspectives and presents successful aging as a balancing act on the part of elders. Successful balancing results in minimizing age-related losses, while capitalizing on age-related gains through processes of choice and adjustment. For instance, elders frequently aspire to live independently throughout their late years and according to Sorensen (2007), the majority of people aged between 65 and 79 live in their own homes. Of these elders, eight out of ten remain in the same property they had lived in 5 years previously.

The aspiration to live independently is often challenged by age-related physical, social, and/or cognitive losses that make maintenance of the large family home increasingly difficult. An elder may make the choice to downsize to a condominium with maintenance services, therefore selectively limiting the environmental demands and

optimizing performance, by compensating for frailty. Applying this model to elders in higher education is especially useful for its bases in human development and autonomy (Baltes & Baltes, 1990).

Applications of Selective Optimization with Compensation. The model of selective optimization with compensation involves three interacting elements all of which need to be used to some degree to complete the model, but the extent to which each is used can vary by degrees depending on the individual and the situation. The first element is selection, which involves limiting one's goals or domains of functioning as a result of a loss in certain resources such as time and energy due to aging or adjusting those goals and domains to fit the level of available resources (Baltes & Baltes, 1990; Freund & Baltes, 1998). For example, due to aging and having less energy, a person requires more sleep in a 24-hour period and thus has less time to complete all the activities throughout the day that he or she was once able to do. Therefore, this individual must choose the activities and goals that are most important. A study by Gignac, Cott, and Badley (2002) focused on a population of older people with osteoarthritis. The ability of participants to set selective priorities was not always possible due to disease progression. Often the arthritis had already progressed to the point where participants were forced to select to just complete the essentials of daily living, limiting opportunity for further selection.

The second element of the model, optimization, refers to engagement in behavior to enrich and allocate the resources available in order to maximize the likelihood of attaining chosen goals (Baltes & Baltes, 1990; Freund & Baltes, 1998). This may involve more studying, learning new techniques, and maintaining or improving upon the current

level of performance of a certain activity. This is where the quality of plasticity of the model successful aging comes into play. In order for an older person to develop and continue to do things of personal importance and meaning, they may have to learn new skills, or hone existing skills, in order to maintain performance to reach the desired goal. The model's third element is compensation. When a person's resources become limited but the activity or goal requires a broad range of skills or skills at an in depth level, the person must modify or substitute actions and behaviors to successfully complete the process (Baltes & Baltes, 1990; Freund & Baltes, 1998).

An example of the application of the model of selective optimization with compensation is a man who played golf his whole life and wants to continue in old age. He may select golf as a meaningful activity in preference over other regular activities that are less important to him. To optimize his game, he may need to practice more and play at the time of day when his energy level is at its highest. Finally, to compensate for losing some resources due to aging, he would need to improve the technique of his swing to make up for a loss in strength and he may also only play nine holes instead of 18.

Although the model of selective optimization with compensation was developed to increase the likelihood of successful aging (Baltes & Baltes, 1990), it can also be applied to specific populations of older people in order to study how they apply the three elements to an acquired disability (Gignac et al., 2002). This theoretical orientation also has applications in situations not unique to the elderly. Since development is considered a continuum, people of all ages use the strategies of selection, optimization, and compensation, and it has been used in the workplace as a correlate with productivity

(Bajor & Baltes, 2003; Baltes & Dickson, 2001; Baltes & Baltes, 1990). Successful aging

and development are processes that can vary widely among individuals. The individual

realities of the experiences are not standardized across the board. Baltes and Baltes

(1990) stated that, "the process of selective optimization with compensation, although

general in its 'genotypic' characteristics, is quite diverse in its phenotypic manifestations"

(p. 27). Therefore, although the model was developed within the framework of successful

aging for the elderly, it has broad applicability, serving as a model from which to

measure adaptability to change.

The particular appeal of selective optimization and compensation to the context of

higher education and successful aging relates to the developmental tasks experienced by

elders as they transition from independent to residential care living. The process that

elders engage in to down size their residence, and selecting the supportive environment of

a continuing care retirement community, is easily conceptualized using selective

optimization and compensation principles.

Rowe and Kahn's Successful Aging

In addition to the sociological perspectives on aging reviewed in Chapter One,

there are multiple individual issues that contribute to what Rowe and Kahn term

'successful aging' (1997). This model presents successful aging as more than the absence

of disability and disease and proposes three subparts which are, to an extent, hierarchical:

minimization of disease and disability; high levels of function, both physical and

cognitive; and, active engagement with life. Minimization of disease and disability refers

to the presence or absence of disease but extends also to the absence, presence and

severity of potential risk factors for disease. High levels of function in both physical and cognitive domains gives rise to the potential for engagement in activity. Active engagement with life focuses on two areas out of other potential areas, interpersonal relations and productive activity.(Rowe & Kahn, 1997).

Rowe and Kahn (1997), whose model of successful aging guided the prestigious MacArthur Studies of Successful Aging, differentiate between *usual agers*, described as persons with no chronic disease but high risk, and *successful agers*, persons with low risk for chronic disease and high functioning levels. The researchers define successful aging as "the avoidance of disease and disability, the maintenance of high physical and cognitive function, and sustained engagement in social and productive activities" (Rowe & Kahn, 1997, p. 433). This definition, however, has been challenged as exclusive for singularly focusing on the lack of disease and implying an elderly person living with disabilities or in an institutional environment is aging unsuccessfully (Reker, 2002). The absence of disease and disability may contribute to subjective perception of successful aging but is not exclusive to it (Ryff et al., 2004). Reker (2002) and Bowling and Iliffe (2006) contend the definition of successful aging should expand to encompass older adults who have experienced some loss in functioning, particularly as the population ages.

While many researchers agree successful aging is a multidimensional concept (Bowling & Iliffe, 2006; Rowe & Kahn, 1997), most models of successful aging assess only one component. These models are classified as biomedical, psychological, and psychosocial (Bowling & Dieppe, 2005; Bowling & Iliffe, 2006). The biomedical model,

employed by Rowe and Kahn (1997) and The MacArthur Studies of Successful Aging

(Tabbarah, Crimmins, & Seeman, 2002), characterizes successful aging in terms of

health, or the absence of disease or disability. This model eliminates a large number of

older adults, as the lack of disease or disability is improbable as the body ages. In fact,

Bowling and Dieppe (2005) found that while half of older adults classify themselves as

aging successfully, only one fifth would be considered successfully aging by the

biomedical model.

The psychological model, used by Freund and Baltes (1998), examines

psychological resources that support successful aging. These include effective adaptation

and coping, self efficacy, positive outlook, life satisfaction, existential beliefs, and

subjective well-being (Bowling & Dieppe, 2005; Bowling & Iliffe, 2006; Reker, 2002).

The psychosocial model of successful aging focuses on the social functioning of elders. It

comprises frequency of social interactions, social role competency, positive relationships,

and participation in social occupations as means of assessing successful aging (Bowling

& Dieppe, 2005; Bowling & Iliffe, 2006).

Despite the seemingly disparate schools of thought guiding the models, research

has ascertained several common predictors of successful aging. Cognitive functioning has

been identified as both a common concern for older adults, and as a significantly reliable

determinant of successful aging (Reker, 2002; Rowe & Kahn, 1997). Tabbarah et al.

(2002) linked cognitive and physical functioning, both predictors of successful aging,

finding that as cognitive performance declined, so did the ability to perform both routine

and novel physical tasks. Rowe & Kahn (1997) found that poor performance on physical

assessments reliably predicted mortality in five years.

Physical functioning also relates to another predictor of successful aging,

participation in occupations, as even a minimal decline in physical functioning can affect

occupational performance. Participation in meaningful activities, among other things,

fosters self-efficacy, life satisfaction, and purpose, proven psychological predictors of

successful aging (Reker, 2002; Rowe & Kahn, 1997; Stevens-Ratchford & Diaz, 2003).

As previously noted, adaptation and coping are integral components of successful

aging. Also referred to as resilience or plasticity (Rowe & Kahn, 1997) or compensation

(Freund & Baltes, 1998; Stevens-Ratchford & Diaz, 2003), effective adaptation to change

and coping with stress is a common characteristic across all models of successful aging.

A final shared predictor is social resources. Reker (2002) found social resources a

significant predictor of successful aging for both institutionalized and community-

residing elderly. Rowe and Kahn (1997) characterized isolation as a risk factor in aging,

and found social connection a determinant of longevity in men. In their survey of

different models of successful aging, Bowling and Iliffe (2006) found marital status

contributed positively to successful aging in every model. Research has also found a link

between marital status and participation in productive activity (Rowe & Kahn, 1997).

One aspect that Rowe and Kahn have neglected to include in their model is the

realm of spirituality that seems to magnify in importance as many individuals age

(Crowther et al., 2002). In spite of the fact that Rowe and Kahn's model is incomplete in

addressing elders with disease or disability, and the fact that the model neglects the realm

of spirituality, it continues to provide a useful and simple foundation to help understand participants' ability to age well. This model also resonates with my own clinical background in rehabilitation, where the goals of minimizing disability, maximizing function and promoting participation are considered essential. In an effort to address some of these shortcomings, this research will utilize the conceptual model of Rowe and Kahn's (1997) successful aging in conjunction with the gerotranscendence model of positive aging presented by Tornstam (2005) as the guiding frameworks for this research study. I believe that this combination supports a holistic perspective from which to understand the factors contributing to successful aging in this population.

Gerotranscendence a Theory of Positive Aging

Tornstam presents qualitative findings which describe and support his theory of gerotranscendence (1997; 2005). He describes the need to generate a new way of conceptualizing aging, since many of the previous models seem to be inadequate to describe certain aspects of late life development. Tornstam presents a developmental model of positive aging, which is characterized by a shift away from a materialistic and pragmatic worldview to one that is more cosmic and transcendent. The theory suggests that older people continue to develop by entering a final phase of life characterized by increased life satisfaction, maturation and wisdom. This is a contrast to the assumption of 'successful aging' as a continuation of, or holding onto, mid life ideals (evaluation of self using mid-life frames of reference) and perspectives of reality.

Tornstam conducted a series of semi-structured interviews with people from a wide age range (52 – 97 years) which, unlike some studies, included the oldest old. Open

theme analysis revealed three dimensions of gerotranscendence; the cosmic dimension, the self and the social and personal relations. The theory of gerotranscendence advocates that both are subject to developmental change in the latter years. It is not a quest of balancing an ageless self in an aging body. To this end, the views of one 69 year old female respondent add strength to the theory. She now seeks happiness and engagement with the world through increased solitude, removing herself from her large circle of friends, viewing party going and conversations with groups of people as make believe. There is a lower drive for productivity and engagement in the way that she previously did. Therefore, productivity is redefined in more individual terms during this latter developmental phase. This definition adopts a more personal form, different from Rowe & Kahn's assumption of successful aging that meaningful engagement is active and healthy (1997). In keeping with the selective optimization with compensation theory (Baltes & Baltes, 1990), occupation can be healthy but not necessarily active to be defined as meaningful. In Erickson's (Erikson, Erikson, & Kivnick, 1986) view of 'integrity versus despair,' this woman would be viewed as someone who has achieved ego-integrity in the face of despair.

The Cosmic dimension presents an altered sense of time. Respondents referred on a number of occasions to the fact that they often think of their childhood years and that they can live within two timeframes at once. Another point is that there appears to be an assumption that older people develop interests in small everyday experiences that could be perceived as filling idle time but in fact, could be seen as having a deeper significance, i.e., taking an interest in nature, increasing acceptance of life and death, etc.

The Self is gradually changing and evolving in gerotranscendence theory. From the theoretical perspective of gerotranscendence, the self is not seen as ageless in an aging body. This does not necessarily refer to discovering aspects of the self not previously known but rather redefining qualities that were already known. Almost all respondents talk about the developing and changing self. Hallmarks of this redefinition include greater self-acceptance and personal satisfaction.

Regarding social and personal relationships. Gerotranscendence postulates that social disengagement occurs on a deeper level. Older adults' priorities shift, to redefine the meaning of social relations, as elders become more selective in choosing the company they keep. This is viewed as a freeing of role expectations. Individuals begin to care less about onlookers' views and the views of those in previous circles of friends. This shift from social to personal values tends to increase tolerance, broad mindedness and humility. "The need for contemplative and positive solitude is not the same as loneliness and disengagement, rather a form of development" (Tornstam, 1997, p. 153). In Tornstam's view, the theory goes beyond Erickson's theory of integrity versus despair (Erikson et al., 1986). In both cases, aging is viewed as developmental and ending in a state of maturity. Tornstam (1997) views ego-integrity as a backwards integration process and gerotranscendence as a forward or outward integration process including a qualitative redefinition of reality. Therefore, this outwardly appears productive and may or may not include a wish to 'stay young.'

Social justice guides fair resource allocation. In short, older people should ideally have choice available to them to study within higher education should they wish to do so;

but it should not be assumed, according to gerotranscendence theory that older people need to be productive to be fulfilled and to be deemed to be aging successfully. The disengagement theory states that the expectation of a person's disengagement is not only built into the social structure, but also, the individual shifts his orientation and modifies his attitudes so as to 'ready' himself for the disengagement process (Dean & Newell, 1961, p. 75).

Because successful aging is both multidimensional and applicable across a variety of disciplines, synthesizing the myriad of conceptualizations into one succinct definition is challenging. Based on the commonalities in research findings, accurate descriptions of successful aging should include references to the ability to adapt to changing circumstances in life, engage in meaningful social relationships and occupations, and maintain a personally acceptable level of physical, cognitive, and psychological functioning. In reality, aging cannot be characterized as continually successful or unsuccessful, but as a continuum with periods of both successful and usual aging (Bowling & Dieppe, 2005; Rowe & Kahn, 1997).

Challenges to Higher Education

As the population over age 65 increases, so does the social pressure on the federal government to fund the tremendous increase in services for the aged while maintaining a commitment to higher education access. Commenting on changes in higher education over the years since 1960, Kerr (2001) acknowledges competition for public resources including health care, primary, secondary education and control of crime is greater now in comparison to the 1960's. Therefore, "more attention must be given to securing

financial resources for higher education's operations, and less effort is available to plan

for the future" (p. 207). However, extraordinary effort may in fact be necessary to plan

for the future if, as Hudson (2007) warns:

> …on historical, ideological, substantive, and fiscal grounds, moving
>
> education in a meaningfully intergenerational direction would require
>
> extraordinary efforts. The implications of an aging population contribute
>
> to a reasonable case for investing more educational resources in middle-
>
> aged and older age groups (p. 271).

Manheimer (2005), advocates that policies should accommodate for education for elders

but the government is faced with the difficult choice, education for the young versus

privileges for the old. These issues extend to higher education institutions themselves.

Regarding older people sharing the classroom with younger people for intergenerational

opportunities, college administrators and program leaders are faced with a dilemma

regarding allocation of resources and distributive justice (Manheimer, 2007). This will

undoubtedly be a source for significant political debate in the future (Day, 1992).

Continuing with an age-segregated approach to both education and elder services funding

streams, we run the risk of fostering conflict and age-stratification. This conflict will

likely further diminish the social value associated with our elders, with the potential

result being further marginalization of older adults.

Massachusetts has a strong tradition of being a national leader in higher

education, with the highest concentration of nationally ranked institutions of any state in

America. Hundreds of U.S. academic institutions saw a rise in the college-age population,

a demographic trend which started in the 1990's, known as the 'baby boom echo' (Roach, 2008). Future enrollments of traditional-aged students are predicted to decline, due to the shrinking population and greater options for distance learning. Some are predicting that it will become increasingly difficult for some institutions of higher education, especially small private colleges, to remain economically viable (Ehrenberg, 2000, 2006; Ehrenberg & Rizzo, 2004; Halligan, 2004; Harrison & Tsao, 2006; Hoover, 2005; Kane et al., 2003).

It seems that the marriage between higher education and the needs of elders may be important in order to address issues in both arenas. Achenbaum & Cole (2007) suggest that "Gerontologists concerned about designing and refining age-related policies must focus on *aging* from womb to tomb" (p. 240). As we consider the social imperatives necessary to promote successful aging in our expanding population of elders, it is important to consider existing social institutions. Pertinent to the discussion for this study is the potential role that institutions of higher education may play in promoting successful aging. At the core of this discussion is the ever present debate about the ideal form and purpose of American higher education in our democratic society (Birnbaum, 1988; Kerr, 2001; Zusman, 1999). Rather than argue the pros and cons of this debate, this section will focus on the financing issues that exert multiple pressures which directly impact American higher education.

Given that much of our social order is dictated by funding resources from either the government or private sources, it should come as no surprise that this factor is strongly influencing the structure of higher education. In spite of the fact that there is a

relative decrease in the demographic of traditional college aged students, application rates and enrollments are far exceeding any previous generation, increasing the demand, especially for highly selective institutions, and giving rise to increased marketing initiatives. "The most selective reject seven out of eight applicants, almost all of whom are qualified" (Kirp, 2003, p. 2; Kirp & Holman, 2003). Yet institutions of higher education are not only interested in selling their product, they strive to attract the exceptionally qualified buyer, further complicating the marketing equation. This pressure to market higher education within our democracy is making it difficult to see the altruistic potential for this social resource. Kerr (2001) describes this shift in focus away from the social good onto the individual choosing to undertake a program in higher education as an effort to improve employment prospects. He states that, "A life of affluence is replacing a philosophy of life as the main purpose of higher education. Another rising market (Market III) serves retired persons wanting education. Higher education is less an institution apart and is integrated into all industrial and social life" (p. 221). Kerr's description of higher education's integration into our social fabric, suggests that pressures from heightened selectivity and demands for older adult learning will be central to the upheaval and social reorganization necessary in light of shifting demography.

This shift of purpose of higher education is also reflected in the structure of the business of higher education. Admissions departments are now marketing centers, striving to meet the demands of an ever more entitled customer.

Even as public attention has been riveted on matters of principle such as affirmative action and diversions like the theater-of-the-absurd canon

wars, the American university has been busily reinventing itself in

response to intensified competitive pressures. Entrepreneurial ambition,

which used to be regarded in academe as a necessary evil, has become a

virtue (Kirp, 2003, pp. 3 - 4).

The re-invention of higher education in our time has set the stage for much ambiguity, and, at the same time, presents many opportunities.

David Kirp (2003) summarizes the cacophony of factors influencing the state of American higher education in this excerpt,

New educational technologies; a generation of students with different

desires and faculty with different demands; a new breed of rivals that live

or die by the market; the incessant demand for more funds and new

revenue sources to replace the ever-shrinking proportion of public support;

a genuinely global market in minds: taken together these forces are

remaking the university into what has variously been called the site of

"academic capitalism," the "entrepreneurial university," and the

"enterprise university" (p. 6).

While it is still very unclear exactly how American higher education will adapt to these influences, it is clear that the times are changing and higher education will too (Jencks & Riesman, 2002). Calls to diversify revenue streams in the wake of continued funding shifts, and increasing pressures to meet market demands will have a significant impact on shaping the future of higher education (Ehrenberg, 2000, 2006; Ehrenberg & Rizzo, 2004; Halligan, 2004; Kirp & Holman, 2003).

College campus as a microcosm of society. The fact that colleges and universities are competing more than ever for the best and the brightest students, is bound to have an impact on campus. Selectivity within the college admissions process risks the potential for increasing the sameness of the members making up the campus community. Colleges have had to take active steps to maximize diversity within the community. Additionally, as colleges strive to maximize diversity, increased diversity raises the need to contend with issues related to achievement gaps.

When considering the role that the campus context plays in affecting student outcomes, Feldman and Newcomb (1969) suggest that the processes for admission to an institution of higher education have a great deal to do with the developmental outcomes of a college experience. In particular, they identified that there is an important process of self-selection that goes into choosing a college that will be a good fit for students. Thus, as a result of self-selection, students find that the characteristics that attracted them to the institution, also attracted other like minded individuals. They go on to describe a process of accentuation that further magnifies the qualities that lead to self-selection. Within the college microcosm, individuals find that the similarities that prompted the selection of the institution are actually amplified by being surrounded by like-minded peers. The process of self-selection sets the stage for individuals within the college community to achieve some degree of comfort initially, which is then further enhanced by the college experience.

Continuing Care Retirement Communities

The American Association of Homes and Services for the Aging (AAHSA, 2007) predicts that the population of Americans age 65 and older will reach 71.5 million by the year 2026. The AAHSA also estimates that approximately 60% of Americans over the age of 65 will require long-term care at some point in their lives. These numbers certainly indicate a growing need for services that address this expanding population. While there are a multitude of options for long-term care, this literature review will focus on Continuing Care Retirement Communities (CCRCs). AAHSA indicates that there are currently 2,240 CCRCs in the United States housing approximately 725,000 individuals. CCRCs are on the rise in the United States offering a unique philosophy and more comprehensive services as compared to other available long-term care options (Heisler, Evans, & Moen, 2004).

One of the overarching concepts anchoring the philosophy behind the development of CCRCs is to provide residents the chance to "age in place" (Krout, Oggins, & Holmes, 2000, p. 698; Moen & Erickson, 2001, p. 54). Aging in place becomes an option in CCRCs, as these communities provide access to comprehensive services to their residents on a wide continuum of care, to be utilized as age-related disability increases (Jenkins, Pienta, & Horgas, 2002; Moen & Erickson, 2001). The living arrangements typically fall into three categories; independent living, assisted living and nursing home care. One important tenet of CCRCs is the timeframe in which new residents move in. In most cases, the move to a CCRC must occur while an individual is still independent but projects that at some point in the future more in-depth services will

be required (Jenkins et al., 2002; Krout et al., 2000; Moen & Erickson, 2001). Aside from the primary healthcare-related and assisted living services provided by CCRCs, residents also have access to a wide variety of recreational/social activities. Some examples from the research include "Gerifitness programs, happy hours, music-and-motion programs" (Jenkins et al., 2002, p. 143), as well as "bridge and scrabble games, theater and dinner evenings in town and even a workshop well-equipped with power tools" (Bertsch, 2005, p. 242). These services are integral to the CCRC and hope to engage residents in order to improve health-related quality of life (Jenkins et al., 2002; Krout et al., 2000). Consistent with Rowe and Kahn (1997), these authors draw a direct connection between quality of life and on-going engagement.

CCRC demographic profiles. The demographic information gathered for various research studies on CCRC residents across the country indicate some typical characteristics of the entire CCRC population. In the five studies used for this literature review, sample sizes ranged from 67 to 167 residents. Krout et al. (2000) indicate an important potential limitation of their study in that it is not clear how the residents who chose to participate in the study differ from those who did not. However, they state that based on previously completed research, the sample of participants was similar to many other CCRC populations. As noted in Chapter One, the relatively advantaged status and homogeneity of the Lasell Village sample in this study is similarly reflective of these reported samples. However, in spite of this homogeneity, it is unclear how residents who chose to participate in this study differ from those that did not volunteer.

Three studies of CCRCs reported relatively homogeneous samples (Heisler et al., 2004; Krout et al., 2000; Moen & Erickson, 2001). The populations of these studies contained approximately 60% female participants; with an average respondent age of 75 years old, and the majority (approximately two-thirds) of the respondents in the first four studies were married. However, the second of the two-part study by Omoto & Aldrich (2007) reported the number of participants who were married to be less than half. Their study was specifically designed to identify the challenges and opportunities faced by people in the third age when moving to and living in CCRCs,

Jenkins et al. (2002) described a somewhat demographically different study sample. A higher majority of females, approximately 75%, and a higher average participant age of 85 were reported. Approximately 71% percent of the sample was unmarried, although it is unclear exactly how many residents were widowed or never married. These differences pose an interesting question because although the first four studies find similar resident attributes for gender, age and marital status, the sample sizes were smaller in comparison with the Jenkins et al. (2002) study that measured the largest sample (167 residents). Therefore, based on the literature, it is difficult to be too definitive as to the characteristics of a typical CCRC resident population. This author's experience suggests that the majority of residents are female and their average age is mid-seventies or beyond.

Based on an examination of the income history of the participants, similar distributions of socioeconomic status were reported in these studies (Heisler et al., 2004; Krout et al., 2000; Moen & Erickson, 2001). Moen and Erickson (2001) found that 79%

of respondents had incomes above $50,000, while Krout et al. (2000) and Heisler et al.

(2004) found that approximately 60% of respondents had incomes of $75,000 or more.

Omoto & Aldrich (2007) reported that 66% of participants in their study had incomes

between $25,000 and $75,000. This attribute of CCRC residents having more of a

financial advantage makes sense when we evaluate the cost of living in a CCRC.

Consistent with earning history, it appears that CCRC residents may be better educated

than the general population, with a majority (approximately 60%) of CCRC residents

having earned a graduate or professional degree (Heisler et al., 2004; Krout et al., 2000).

This is considerably higher than the 2007 national average of 19% as reported in the

Older Americans 2008: Key Indicators of Well-being (2008). This factor has direct

implications to the interface of CCRCs and higher education since the strongest predictor

of lifelong educational pursuit is level of education (Manheimer, 2003).

Financial considerations with CCRCs. Since CCRCs are as yet unregulated by the

government, and for the most part unsubsidized, the cost of living in a CCRC can vary

widely based on the specified terms of each site's negotiated contract. Many different

cost structures have been established in this unregulated marketplace. Residents might

pay a high entrance fee and in return receive medical care with no or low co-payments for

services received. Some facilities require that residents pay a lower entrance fee upfront

and receive the same medical care at reduced rates. Another option might be for residents

to pay no entrance fee but pay highly for any medical care and services rendered

(Bertsch, 2005).

Himes (2002) describes the essential functions of most continuous care retirement communities (CCRCs) as combining care services for residents in various types of housing, including independent housing units, assisted-living facilities, and skilled nursing homes. The communities are unlike other retirement communities (such as an over 50-golf complex) which are often age-segregated and focus on provision of leisure activities and amenities. The continuous care communities aim to serve older residents as their health status and needs change over time, by allowing them to transition from one type of unit to another, in line with their health needs. Usually CCRCs provide meals, housekeeping, and laundry services for residents, with some offering recreational classes, exercise facilities, and educational and hobby groups. Assistance with personal care and skilled nursing may be provided to residents in the independent units or assisted living quarters along with rehabilitative therapies.

Increasingly, CCRCs are becoming more financially viable businesses, and are often built and managed by the hospitality, rather than the health care industry. Because CCRCs assume the risk of providing long-term care services to anyone they admit, they carefully screen residents before accepting them. Accordingly, CCRC residents tend to be wealthier, more educated, and in better health than the general older population (Himes, 2002, p. 27).

The AARP (2004) reported that the costs involved in living in a CCRC are high and largely unaffordable to people with low or low-to-moderate incomes. They report entry fees ranging from $20,000 to $400,000 with a monthly rate of $200 to $2,500. Some residents own their living space while others rent. The CCRC studied by Krout et

al. (2000) required a minimum non-refundable entrance fee of $100,000 and a monthly

apartment fee of $1,500 per person. These specific data correspond relatively well with

AARP's report, confirming the significant cost involved with moving to and living in a

CCRC.

Fee structure at Lasell Village. Lasell Village seems to fall into the category of

charging significant upfront fees from residents at the time of entrance. Based on

marketing materials from the facility, the rates for entrance fees as of July, 2008 range

from a minimum of $242,000 to as much as $900,000, with at least an additional $30,000

for a second occupant. This entrance fee is 90% refundable if the person leaves the

facility or it is paid to their estate upon death. Monthly fees paid in addition to this

upfront fee, range from $2,940 to $7,515, with an additional $1,275 charged monthly for

a second occupant. The size and location of the apartment under contract determines the

fee structure. The facility offers one meal a day (usually evening), and weekly cleaning

services. Medical care is available in the 40 bed skilled nursing facility, but there is no

assisted living option on site. The available continuum of care moves directly from

independent living to nursing home level of care.

Life inside the retirement community. Omoto and Aldrich (2007) collected

interview and follow up survey data from residents of three retirement communities in

California. Their work suggests the process of selecting and making the decision to move

into a retirement community is more significant than the move itself. Additionally, their

participants reported that the reasons for the decision centered on health issues and social

difficulties. Benefits included care, socialization, dining room, and activities.

In summary, the elderly population in the United States is rapidly growing. This population will require long-term care and CCRCs provide a unique approach by emphasizing the concept of 'aging in place' through a wide continuum of available care and living options. Based on the reviewed research, there are typical attributes of CCRC residents including gender and age, as well as, marital, financial, and educational status. The cost of living in a CCRC is substantial and generally unsubsidized, limiting the option of CCRC living for a large portion of individuals who may otherwise benefit from this service model.

CCRCs and Higher Education

There is a growing trend in the United States of college affiliated retirement communities (Harrison & Tsao, 2006). One significant variation noted in the organization of CCRCs is in the development of academically affiliated CCRCs. Many colleges and universities are beginning to affiliate with CCRCs for a variety of potential reasons, not the least of which is to attempt to enhance revenue streams (Halligan, 2004). Currently, it is estimated that there are approximately 60 CCRCs affiliated with higher education institutions and another 50 in development (Halligan, 2004; Harrison & Tsao, 2006). There is varying degree of affiliation with only seven of the initial forty having close affiliations in both proximity and organization (Pastalan & Tsao, 2001). Lasell Village is one of these initial seven facilities.

Ward, Spitze, and Sherman (2005) used survey methodology to test receptivity to a campus based intergenerational (graduate student families and elders) housing program amongst college faculty and staff, alumni, and a community sample of elders over age 65.

While they found that a little over one-third of their sample of more than 1400 were receptive to the idea, interest was skewed to faculty and staff. Those without direct ties to the university, alumni and general community members, responded to the survey at much lower rates (12% and 12%, respectively), when compared to the faculty and staff (55%), strengthening the credibility of faculty/staff responses over the other two groups. Of interest in this study is that they conducted a secondary analysis of 509 respondents who identified strong interest in such a program, reporting that four intergenerational aspects: opportunities for shared meals and help; interest in cultural and age diversity; opportunities for learning and mentoring; and, involvement with children were all strongly associated with interest (Ward et al., 2005).

The CCRC at Lasell College, known as Lasell Village, is a unique program that has made extraordinary efforts to push the envelopes of age-integration and aging in place within a higher education context. This setting provides a valuable perspective to understanding the factors that support or obstruct elders' engagement in higher education. This understanding is necessary to making informed policy decisions about future living and learning programs for elders. Currently, the Lasell Village program is mainly for those who are financially privileged. Prospects for less affluent individuals to enroll in such programs appear meager, at least in part due to the fact that opportunities for continued learning in the later years are viewed as optional and not necessary (Manheimer, 2007).

Conclusion

This literature review has explored literature form diverse perspectives to shed light on the multiplicity of factors contributing to older adults' ability to age successfully and the potential that the higher education context may contribute to aging well. In spite of the many and varied sources cited in this chapter, current research has yet to address the direct impact that living and learning on a college campus has on individual elders' perceptions of successful aging. It seems relevant as one attempts to synthesize the literature from diverse perspective to revisit two key concepts cited in Chapter One. First, Manheimer's (2003) observation that older adult education touches many disciplines on the margins. It therefore does not have a singular body of literature to consider, and as yet has an inadequate foundation of research. Second, we can look to Dewey's ideals about democracy and see this perhaps as an overarching rubric to consider the issues at hand.

The aforementioned studies reveal the complex interaction of the aging process as it influences well-being in elders, and the potential for adaptations to mitigate against the deleterious effects of aging on SWB. Despite significant changes in the social resources for elders, close relationships continue to be important to maintain. Further implications suggest that elders benefit form closer, more intimate relationships with fewer people than those who are younger (Steverink & Lindenberg, 2006; Tornstam, 2005). In regards to money and income, elders are more likely to have higher levels of well-being if they live in richer countries, and have substantial funds for living. In addition, it is important to emphasize that elders must not be overtly focused on the attainment of material possessions, because this has been shown to have negative impact on subjective well-

being (Diener & Biswas-Diener, 2002). Internal locus of control, in relation to its' impact on subjective well-being for elders was qualified as not having as much importance as self-directed learning readiness. This discovery puts forward that promoting and maintaining self-directed learning could be a useful tool for helping elderly populations maintain feelings of well-being, despite age-related changes (Gardner & Helmes, 1999).

In addition to learning affecting elders' well-being, Compton's (2000) research points to meaningfulness as an important factor influencing well-being. While meaningfulness does not pertain specifically to elders, their ability to define, and adapt, meaning in their lives has significant implications. During the late stages of life it is typical for people to contemplate how they have chosen to live their lives (Tornstam, 1997, 2005). Compton's (2000) study gives rise to the fact that those who believe that life has meaning, score better on subjective well-being measures. Ultimately, the literature suggests that ascribing to the above suggestions, when possible, may promote subjective well-being for older populations. Therefore, as Ryff et al. (2004) suggest in their study, better health will also be attained as those who yielded high scores on subjective well-being measures were more likely to demonstrate indicators of positive health.

Health status, both physical and mental, for elders resonates through most definitions of aging well (Baltes & Baltes, 1990; Rowe & Kahn, 1997; Ryff et al., 2004). The literature does not offer clear evidence that education affects older adults' health and subjective well-being. One study reported by Panayotoff (1993) attempted to research the direct health impact of continuing education in older adults. She studied 114 participants engaged in four distinct, age-segregated, continuing education offerings in a community

college setting. Using pre-test, post-test, and delayed-post-test data collection, she found little impact from engaging in education on her health variables as measured by the multidimensional self-report instrument *Self Evaluation of Life Function*. While she notes many limitations that may account for the inconclusive findings, she offers the following recommendation:

> The independent variable (continuing education) and the dependent variable (health) are inherently complex. A qualitative approach to answering this question would help by assessing process as well as outcome. Although it could be anticipated that the benefits on health would be diverse, common themes might emerge, leading to a more precise operational definition of the independent variable, continuing education as activity. An exploration of the dynamics of active participation in continuing education by older adults can lead to a better understanding of the therapeutic and non-therapeutic effects of continuing education on their health (Panayotoff, 1993, pp. 19 - 20).

Manheimer (2007) refers to the Third Age, a term coined by Laslett originally to capture individuals with improved health and wealth in the post-retirement period. People in the Third Age represent a significant growth area for lifelong learning because prior education is the chief determinant of demand for continued learning. Rising rates of high school and college completion are causing a dramatic growth in the number of well-educated elders as our population ages. Clearly, the complex nature of aging, health, and lifelong education combine to make this research complicated. Beginning to sort out the

key variables and perspectives that elders consider in defining successful aging in the

context of higher education, will serve to fill a void in the literature. Additionally, the

results of this study may begin to define the potential structure of elder learning in our

democratic society.

CHAPTER THREE

Methods

In an effort to improve our understanding of intersections of higher education and successful aging, this qualitative study employed a phenomenological methodology to describe the perceptions of elders residing in a continuing care retirement community (CCRC) integrated within a higher education institution. The basis for this study emphasizes the transactional nature of the relationship of the researcher to the participants. Understanding is negotiated here, in this transaction. Within this transaction there are a variety of considerations including (but not limited to): autonomy, authority, experience and presuppositions of the researcher, and reflexivity (Lincoln & Guba, 2000). "Subjectivity is an inherent aspect of interpretive research, from the selection of research participants to the analysis of the data" (Paterson, 1994, p. 301). Put simply "qualitative research methods involve the systematic collection, organization, and interpretation of textual material derived from talk or observation. It is used in the exploration of meanings of social phenomena as experienced by individuals themselves, in their natural context" (Malterud, 2001, p. 483).

Pilot testing. During the preliminary planning for this research, I had initially intended to use a quantitative method for data collection. In preparation for this, I developed the instruments that I would use and piloted data collection on a sample of 42 community dwelling elders (over age 65 years). The instrument was 10 pages long, covering over 200 items. As part of this pilot study, research assistants were asked to gather feedback from participants reflecting their reaction to the instrument. Although

most participants completed the survey in fewer than 45 minutes, many expressed

concerns that individual items were unclear or irrelevant to their experience. In addition,

the participants' responses to open ended questions were much richer and complete. The

combination of participant feedback and the richness of the subjective reports caused me

to rethink my methodological approach, supporting the qualitative design of this study.

The structure of this pilot project reflected the intent at the time to complete

primarily a quantitative study. Tufts University Institutional Review Board approved the

study, and deemed it exempt from collecting informed consent since no personally

identifiable information was collected. The sample consisted mostly of white (83%),

married (54%) women (62%), with a high school education or better (92%). Of the 42

completed pilot instruments, 12 included qualitative data on how to make the data

collection tool clearer and easier to complete. Five respondents found some of the

questions to be unclear, four complained that the tool was too long, and three found the

font size to be too small. For each of the following categories, two participants thought

that the questions did not apply to them; that some of the questions were repetitive; that

the questions had too many answer choices, or that the format of the tool was confusing.

Additionally, one participant shared the following quote in the additional comments

section:

> I accept aging including advantages like success of children. It is hard to
>
> accept decline of the physical strengths and mobility. A huge plus is the
>
> joy of grandchildren and their growth and successes. A helpful, loving
>
> mate and a caring, supportive daughter are tremendous gifts. I know it

would not be easy to include some evaluation of how much health and

decline influences the quality of life, but it seems to curtail (severely

sometimes) my range of activities. Consequently, my husband's life is

very much affected as well.

Coupling the richness and eloquence of this quote with the intensity of negative feedback

regarding the quantitative data collection, a determination was made that the concepts

may be better suited to a qualitative methodology. However, the demographic

questionnaire from the original instrument carried forward into the present study.

Qualitative approach. A qualitative approach to this research is particularly

appropriate given that the phenomenon of aging in a higher education context is

relatively new and as yet unreported. "Field research is often utilized for the initial or

exploratory phase of a research project. In this phase the researcher is typically looking at

a social context that is unfamiliar or new" (Frey & Fontana, 1993, p. 23). Thus, the

product of this work is not to understand all aging individuals in relation to the context of

higher education, but rather to develop a deep understanding of the relationship of higher

education to the individual aging processes of these participants. "The province of

qualitative research, accordingly, is the world of the lived experience, for this is where

individual belief intersects with culture" (Denzin & Lincoln, 2000, p. 8). LeVasseur

(2003) expounds on this in the following passage,

Natural science concerns itself with data that can be appraised by the

senses. What can be seen, heard, felt, tasted, and smelled, albeit at times

only by sophisticated technology, lends itself to scientific inquiry

according this tradition. Traditional science has not been concerned with

the lived experiences of individuals, because these are largely

unmeasurable and difficult to appreciate through sensory observation (p.

408).

The previous quote resonates with an inherent tension, or some would say conflict of

purpose, between qualitative and quantitative approaches to research. Schwandt (2000)

suggests that, "…the issue of whether there is a critical distinction to be drawn between

the natural and the human sciences on the basis of different aims – explanation *(Erklären)*

versus understanding *(Verstehen)* – remains more or less unsettled" (p. 191).

Nevertheless, it is clear that qualitative inquiry is a specific approach to research, intent

on enhancing our understanding of the specific phenomenon under study (Denzin &

Lincoln, 2000; Schwandt, 2000).

General Methods

This study employed phenomenological methodology (Creswell, 2007;

Moustakas, 1994) to elucidate the factors within the higher education context that

participants considered contributory to their ability to age successfully. This approach

was particularly appropriate given the fact that the population under study, residents at

Lasell Village, offered a unique perspective on the interaction of aging and higher

education. The exploratory nature of the design allowed participants to both inform the

researcher while uncovering meanings that may yet to have considered or articulated.

While not the primary intent of this study, it was anticipated that participants might be

giving consideration and voice to their beliefs about successful aging in higher education

for the first time. Key variables in this study included the context of higher education, participants' sense of successful aging and subjective well-being, and the role of intergenerational educational experiences.

Phenomenological perspectives. Through this study, I explored and sought to understand the experiences of a sample of the residents of Lasell Village, and particularly their perceptions about aging in light of living and learning on a college campus. One could say that I sought to gain an appreciation of the essence of their lived experiences. Creswell (2007) confirms that given this intent, a phenomenological approach is appropriate in that,

> a phenomenological study describes the meaning for several individuals of their *lived experiences* of a concept or a phenomenon. Phenomenologists focus on describing what all participants have in common…The basic purpose of phenomenology is to reduce individual experiences with a phenomenon to a description of the universal essence (pp. 57 – 58).

Thus, the phenomenological approach leads to the desired outcome in this study, enhanced understanding of the lived experience. Figure 2 depicts an overview of the data sources that will contribute to the final essence. The essence is the resulting representation of the phenomenon under study. Through analysis, the phenomenologist moves from raw data to specific general themes and finally settles on a descriptive representation of the phenomenon, its essence (Creswell, 2007; Moustakas, 1994).

Figure 2

Data Sources
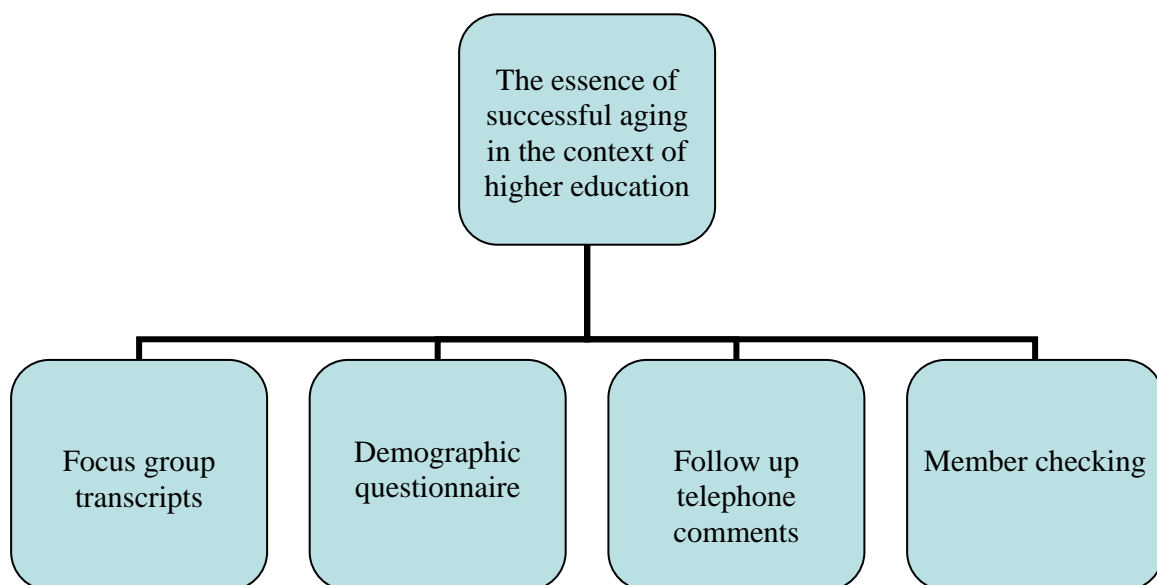
Creswell (2007) warns that researchers should always include some consideration of the philosophical background of phenomenology. Phenomenology draws heavily on the writings of Edmund Husserl (1859 - 1938) a German mathematician. What has evolved is a philosophical approach that challenges the scientific, positivism that was popular in the early 20th century. Rather than search for what is real, the phenomenologist appreciates that there are multiple realities. As such, phenomenologists must suspend their own presuppositions of what is real. One of the primary tenets of this philosophical perspective is that individual perceptions make up individual realities. This research approach allowed me to explore the perceptions of participants in order to understand their individual realities.

In developing an appreciation for the philosophical underpinnings of a phenomenological approach to this research, it is important to note that there is more than one school of phenomenology. Pertinent to this study, I will contrast the descriptive and the interpretive approaches (Creswell, 2007; Lopez & Willis, 2004). The descriptive school is most consistent with the approach of Husserl, and sets forth as its outcome to describe the essence of the phenomenon under study. This is done, by having the researcher distance himself from the data and the analysis, through bracketing. Interpretive phenomenology, championed by Heidegger (a student of Husserl), embraces the experience of the researcher as a tool to achieve an understanding of the meaning of a given phenomenon. The researcher engages with the participants, and the data, to allow for interpretation of meaning in the lived experiences. Here the essence is not only a

description of the what and the how of the phenomenon, but also the why (Creswell, 2007; Lopez & Willis, 2004).

The interpretive approach to phenomenology is also referred to as hermeneutics. Hermeneutical approaches to phenomenological research are most consistent with the approach in this study (Lincoln & Guba, 2000). Schwandt (2000) emphasizes an interpretive approach that involves the negotiation of shared knowledge,

In this sense, philosophical hermeneutics opposes a naïve realism or objectivism with respect to meaning and can be said to endorse the conclusion that there is never a finally correct interpretation. This is a view held by some constructivists as well, yet philosophical hermeneutics sees meaning not necessarily as constructed (i.e., created, assembled) but as negotiated (i.e., a matter of coming to terms) (p. 195).

It is clear that through the process of collecting and analyzing the data, there were multiple opportunities for clarification and testing of meaning. This process of clarification resulted in a shared truth between researcher and participants.

Epoche and bracketing. As stated above, all qualitative research is subjective. Thus as the researcher, my experiences and presuppositions colored the way that I experienced the perceptions of participants. It was important that I remained conscious and explicit about some of these biases as I completed this research project. One strategy for managing this was to separate the researcher's perspectives from the experience of the data through bracketing. Bracketing allowed the researcher to suspend his prior experience and knowledge to be more fully open to understanding the lived experience of

participants (LeVasseur, 2003). Yet, perhaps this was not fully possible or necessary, especially since this study embraces a more interpretive approach. While complete separation of the researcher in an interpretive design is not necessary, it is still necessary to remain cognizant of pre-conceptions of experience and knowledge that will permeate the study.

> The technique of bracketing, as described by descriptive
>
> phenomenologists, is inconsistent and questionable within a hermeneutic
>
> approach (Annells, 1996; LeVasseur, 2003), although making
>
> preconceptions explicit and explaining how they are being used in the
>
> inquiry is part of the hermeneutic tradition (Lopez & Willis, 2004, p. 730).

As I had reflected on and attempted to make explicit my presuppositions that are part of this study, the first thing to consider is that I have over 23 years of clinical experience as an occupational therapist working with older adults in various capacities and settings. This clearly enhanced my ability to readily engage and establish rapport with the participants. I am well versed in engaging with elders from diverse backgrounds, and am aware that my non-threatening interpersonal style and sense of humor allowed me to quickly establish initial trust in these new relationships. This experience proved to be of great benefit, especially during the recruitment and initial data collection steps of the study.

One cautionary stance that seemed warranted in relation to my years of clinical experience is that I have approached most of my work, whether in treatment or research contexts, from an interventionist perspective. It was necessary for me in this study to

leave this perspective aside and not to try to fix anything or anyone in the process of the research. In order to accomplish this, I sought to be ever aware of the boundaries of my role as researcher throughout my interactions with the participants in this study. I was at times required to both redirect participants and set limits on myself as facilitator. The goal of this study was not to intervene but to understand the lived experience of the Village residents, and intervening would have interfered with my ability to gain this understanding.

In preparing for this research study, I explored a vast literature to increase my own knowledge of potential issues related to aging and education. Through this exploration, I developed an appreciation of the value of intergenerational experiences and a sense that they may make a greater contribution to subjective well-being than age-segregated learning. This belief was potentially advantageous since it was in keeping with the philosophical stance of Lasell Village. However, when this did not prove to be the experience of participants in this study, I had to remain open to this discord. By remaining open in this case, I was also afforded the opportunity to learn meanings behind the experiences of either intergenerational or age-segregated educational endeavors for these participants.

Focus Groups. The primary data collection method employed in this study was interview data gathered from focus groups. The primary researcher facilitated all focus group sessions. Morgan (1997) identifies that data collection within the qualitative tradition is typically accomplished through either participant observation or open ended interview. He goes on to suggest that, "focus groups not only occupy an intermediate

between these other methods but also possess a distinctive identity of their own" (p. 8).

Rather than just serving as a shared interview, there is opportunity for the context of the

group to generate new understandings through dynamic processes and participant

interactions (Morgan, 1998a). Thus, I intended to use the focus group data collection

strategy to enhance the richness of the textual material available for analysis.

Phenomenology often relies on repeated in depth interviews. The intent of using

the focus group in this study was to explore multiple individual experiences

simultaneously, uncovering shared meanings faster and more efficiently than individual

interviews. Additionally, since the content of discussion was not considered overly

sensitive in nature, I believed that the group format would be more conducive to fully

exploring experiences of these elders in higher education.

Consideration was given to attempting to pilot test the focus group method of this

present study. Krueger (1998b) suggests that pilot testing is profoundly difficult with

focus groups given that, "More than any other forms of social science research, the

questions used in a focus group interview are hard to separate from the environment of

the focus group" (p. 57). Thus, if something does not go well during the pilot, it is often

unclear what caused the problem. Was it the format, the question, or the dynamic of the

group? While the logistics of such a pilot seemed off putting, a decision was made to run

the initial focus group as a potential pilot group. This was done, but given that the group

ran smoothly and the data were relevant to the phenomenon, the transcripts were carried

forward into the final analysis. Additionally, expert feedback was used to refine my focus

group script, incorporating suggestions for refinement from my faculty advisors and

asking questions of colleagues familiar with research with older adults.

Specific Aims/Research Questions

- To gain insight into the role that the context of higher education plays in elders'

  ability to age successfully:

  - What are the attributes of the higher education context that elders value?

  - How do the opportunities offered on the college campus promote

    engagement and well-being in elder residents?

  - How does the Lasell Village requirement for on-going educational pursuit

    provide support or challenge successful aging in a higher education

    context?

- To explore the use of intergenerational vs. age-segregated educational activities:

  - How do elders correlate educational pursuits with aging well?

  - Are there differences in outcomes from intergenerational and age-

    segregated educational activities?

  - How does intergenerational or age-segregated educational pursuit affect

    perceptions of successful aging for participants?

Setting. In 2000, Lasell College established a continuing care retirement

community called Lasell Village. The program is located on campus affording its

approximately 210 residents access to campus amenities, 'traditional' aged undergraduate

and graduate students and classes. While all residents are required to complete 450

continuing education hours per year, they have a range of choices to accomplish this

including intergenerational courses on campus, or more age-segregated lectures and workshops within the Village. Marketing materials outline the following options for fulfillment of the educational requirements:

- registering for intergenerational classes at the Lasell College or other colleges and universities
- acting as an instructor; participating and/or leading student groups
- community volunteering; participating in Lasell Village-based events like discussion groups or lectures
- travel study such as Elderhostel programs; committee leadership or participation; art activities
- fitness activities
- independent research or continued employment.

This broadly encompassing set of activities that meet the educational requirements also is consistent with the facility's philosophy of "connected learning," which espouses that learning happens in and out of formal classroom settings.

Organizationally, the Village is fully integrated into the structure of the college. The Village residents report their educational pursuits to a Dean of the Village, who tracks education and manages the day-to-day operations of the Village. The Dean's office is also responsible for publicizing educational offerings for residents, and assisting with the development of individual learning plans. Within the college, specific course offerings are identified as intergenerational, inviting Village residents to enroll in classes alongside traditional-aged students. Certain faculty have accommodated for this

intergenerational opportunity through tailoring course assignments to meet the needs of students while capitalizing on the resources of the elders' presence. For instance, one history instructor has traditional-aged students meet with elder residents to explore events such as World War II. This gives students a perspective on the war from the human side, from individuals who had life experiences during the events. From an intergenerational perspective, this opportunity allows the traditional-aged student to learn material at a deeper level, while promoting the engagement, productivity and contribution of the elder.

Sampling. In a phenomenological study such as this, it is imperative that all participants have significant experience with the phenomenon in question (Creswell, 2007; Lopez & Willis, 2004; Moustakas, 1994), namely, the impact that living and learning on a college campus has on successful aging. Given that all residents of Lasell Village share the unique experience of living on a college campus and having to meet the requirement for 450 hours of continuing education per year, I was confident that these participants have intimate experience with the phenomena under study. Unlike quantitative approaches, there is no formula that qualitative researchers can rely on to set an adequate sample size (Creswell, 2007; Sandelowski, 1995). Instead, the qualitative researcher must employ good judgment in planning for an adequate sample.

Sandelowski (1995) suggests what I have come to consider the Goldilocks approach to sampling, "Adequacy of sample size in qualitative research is relative, a matter of judging a sample as neither small nor large per se, but rather too small or too large for the intended purposes of sampling and for the intended qualitative product" (p. 179). This study employed purposeful criterion sampling to draw the sample of 31 (15%

of total residents) participants from the approximately 210 residents of Lasell Village.

Criterion sampling was advantageous in this study to insure that I had a mix of

participants who either had, or had not, chosen to engage in intergenerational learning

(Creswell, 2007). I estimated the sample size at about 40 participants. This number

reflects an appreciation that I would need to have enough individual realities to

appreciate the essence of the phenomenon. Thus, I was striving to have enough variation

of the experiences presented to see how these contribute to the whole. Additionally, a

sample size of 31 participants allowed for saturation and is consistent with what some

authors offer as a guide of between 10 – 50 descriptions of an experience to complete

most phenomenological studies (Creswell, 2007; Moustakas, 1994; Sandelowski, 1995).

As stated earlier, I anticipated that the demographic makeup of the Village would

instill some homogeneity to the sample. I anticipated that the sample would be comprised

of more affluent, white, female participants. Sandelowski (1995) emphasizes that it is not

necessary, nor is it advantageous, to attempt to draw a demographically representative

sample in qualitative research; rather, the priority must be on diversity of experience with

the phenomenon. A representative sample is necessary when one seeks to generalize

findings to the population, which is not the intent of this, or most, qualitative studies.

Criterion sampling of subjects, who have had intergenerational learning experiences and

those that have opted for age-segregated educational activities, will be essential to insure

that these key constructs are described by the data, and therefore available for the

qualitative output. Sandelowski (1995) supports this, "the decision to seek phenomenal

variation is often made a priori in order to have representative coverage of variables

likely to be important in understanding how diverse factors configure the whole. This kind of sampling is referred to as selective or criterion sampling" (p. 182).

The total sample of 31 participants was separated, based on two criteria, to populate six focus groups. Each participant attended only one group. This resulted in, four groups (22 participants) being made up of individuals who self identified as having mostly age-segregated class experiences with fellow residents of the Village. The remaining two groups (9 participants) included members who self identified as taking mostly intergenerational classes on the college campus. This configuration of groups was arranged through consultation with the Lasell Village Dean, and based on the site's interest in exploring if differences existed between these two cohorts of residents. The ratio of four age-segregated groups to two intergenerational groups was based on the fact that there was a substantially smaller cohort of individuals who regularly took part in college-based classes. Given the qualitative nature of this study, it was acceptable that equivalent group size was neither possible, nor necessary.

Morgan (1997) suggests two important rules of thumb for structuring focus groups that informed my sample size decisions. First, he suggests that groups should have between 6 – 10 members, to maximize discussion and give all participants adequate voice. Second, he recommends that studies plan for between 3 – 5 groups, in order to achieve redundancy in content. Since the goal of the sampling is to achieve theoretical saturation, not adequate power, the design is best to be inherently flexible (Morgan, 1997, 1998b; Sandelowski, 1995).

Recruitment Strategy. In June, 2008, approval was obtained from the Boston

College Institutional Review Board (see Appendix A). Approximately six weeks prior to

scheduling the focus group sessions, the researcher met with the Dean of Lasell Village

to negotiate recruitment of participants. It was determined that there was an upcoming

meeting open to all residents of Lasell Village, that I would be invited to speak at to

solicit participants. In advance of this meeting, the Dean sent out a letter of introduction

(see Appendix B), informing residents of this research project, my background, and

inviting them to meet me at the upcoming meeting for more information. The Dean also

posted a poster (see Appendix C) announcing the research and presentation in the main

lobby of the facility.

In advance of the meeting, the Dean and I set the schedule for the six sessions,

spanning the last two weeks of August, 2008. The Dean informed me that this would be a

good time for residents, since the summer class session was over and the fall session had

yet to begin. Session times and room availability were scheduled with the necessary

administrative personnel. Sign-up lists were generated for each of the sessions, and I

identified which sessions would be intergenerational in focus. More than 100 of the

residents attended the all-resident meeting. I spoke for approximately 15 minutes at the

end of the meeting, introducing myself and the research study. The basic inclusion

criteria of being over 65 years old, speaking and understanding English; and residing at

the Village for a minimum of 6 months were reviewed. I invited interested residents to

approach my research assistant or me to sign up for a focus group session, at the end of

this meeting.

All residents who signed up at this session received a copy of the informed consent form (see Appendix D) and the demographic questionnaire (see Appendix E) with the date, time, and location of their focus group session. Those who identified primarily participating in Village based educational programs were asked to speak to me to sign up for one of the four sessions. Intergenerational participants were asked to sign up with my research assistant. This method was a bit chaotic, but after an immediate rush of interested participants, we had over 25 participants scheduled. All residents received my telephone and e-mail contact information and the remaining slots were filled through individual contacts initiated by residents. These additional participants were mailed copies of the consent and demographic forms with the date, time, and location of their group. All participants were asked to bring the completed consent and demographic forms with them to the focus group session.

Individual focus groups were comprised of either intergenerational learners or non-intergenerational participants to explore the potential nuances associated with these different approaches to lifelong learning. In spite of the anticipated willingness of residents to participate in this research, throughout the recruitment phase there was a tacit acknowledgement of the need for over sampling to allow for no-shows or refusals (Morgan, 1997). As such, based on participant availability, groups in this study had between three and seven members (see Table 1).

Table 1

Participant Characteristics

Participant Pseudonym	Age	Sex	Group #	Years at Village	IG or non IG focus	Highest Education	Marital Status
Olga	88	F	1	8.1	Non	HS	Widowed
Joyce	89	F	1	1.0	Non	BA	Widowed
Peg	83	F	1	2.1	Non	MA	Widowed
Mia	84	F	2	3.2	Non	MA	Widowed
Donna	77	F	2	2.2	Non	MA	Married
Alice	91	F	2	8.4	Non	MA	Widowed
Max	96	M	2	7.9	Non	MD	Widowed
Bonnie	88	F	2	1.5	Non	BA	Widowed
Sadie	81	F	2	2.9	Non	MA	Married
Irene	88	F	3	8.3	IG	BA	Married
Mike	83	M	3	8.2	IG	BA	Married
Adam	87	M	3	2.2	IG	BA	Married
Ida	85	F	3	5.4	IG	BA	Single
Penny	87	F	4	3.0	IG	BA	Partnered
Barb	80	F	4	8.2	IG	MA	Married
Harry	90	M	4	8.3	IG	BA	Married
Olive	71	F	4	1.2	IG	PhD	Divorced
Ted	85	M	4	2.2	IG	PhD	Married

Participant Pseudonym	Age	Sex	Group #	Years at Village	IG or non IG focus	Highest Education	Marital Status
Bob	91	M	5	2.2	Non	MA	Married
Eve	85	F	5	2.2	Non	BA	Married
Natalie	88	F	5	8.2	Non	MA	Widowed
Wanda	82	F	5	2.0	Non	MA	Married
Joan	85	F	5	8.0	Non	MA	Widowed
Lois	82	F	5	8.0	Non	MA	Widowed
Sam	93	M	6	2.5	Non	MD	Widowed
Trish	74	F	6	0.7	Non	BA	Divorced
Lina	86	F	6	5.1	Non	MA	Widowed
Doug	81	M	6	7.9	Non	MA	Divorced
Betty	97	F	6	7.3	Non	BA	Widowed
Eliza	83	F	6	8.2	Non	BA	Widowed
Kathy	83	F	6	8.1	Non	BA	Widowed

Five potential participants expressed interest but had scheduling conflicts that did not allow them to participate at all. Two scheduled potential participants, who had expressed interest to participate in focus groups, were unable to due to personal reasons. One was scheduled for an intergenerational session and the other for a Village based session. Both informed the researcher prior to the scheduled session.

Participant characteristics. The results of this study are based on the transcribed interviews of the 31 participants of the six focus groups held over a two-week period. All participants signed the informed consent forms and completed a demographic questionnaire, prior to participating in a focus group session. As anticipated, the sample included about three times as many women as men. All (100%) participants identified their race as white. Most (84%) were either married or widowed. All but one had at least a college education with 84% having either Bachelors or Masters Degrees and 13% with Doctoral degrees (see Table 2).

The sample was significantly older than originally anticipated with an average age of 85.3 (±5.7) years, with participants ranging from 71 – 97 years old. Participants had lived at Lasell Village for between 0.7 and 8.4 years, with a mean length of residence 5.0 (±3.0) years. Of note, although this was not controlled for, each focus group had a mix of residents who had lived at the facility varying lengths of time. Each focus group lasted between one and a half to two hours and had between three and seven participants. The make-up and size of each group session allowed for lively discussions and all participants had ample opportunity to engage.

Table 2

Demographic Characteristics

		Frequency	Percent
Gender	Female	23	74.2
	Male	8	25.8
Marital Status	Widowed	15	48.4
	Married	11	35.5
	Divorced	3	9.7
	Partnered	1	3.2
	Always Single	1	3.2
Self Identified Race	White	31	100.0
Highest Education	High school graduate	1	3.2
	Bachelors degree	14	45.2
	Masters degree	12	38.7
	Doctoral degree	4	12.9
Subjective Health Status	Better than peers	18	58.1
	About same as peers	11	35.5
	Not quite as good as peers	2	6.5

Procedures. Small focus groups of 3 – 7 residents (Morgan, 1998b) were held in a meeting room at Lasell Village. This location was selected for its central first floor location to enhance ease of participation by minimizing any travel burden on participants. Participants sat in comfortable chairs around a conference table. A tabletop microphone and a digital tape recorder were used to audio record each session. The researcher served as facilitator for all focus groups. A semi-structured interview (see Appendix F) was used to guide the discussion of issues related to aging on a college campus. These interview questions are a product of the researcher's synthesis of topics in the literature and from preliminary discussions with key (staff) informants at Lasell Village, and incorporated feedback from faculty dissertation committee and colleagues. The questions were all written to be as open-ended as possible, moving from general topics to specific probes (Krueger, 1998b). As much as possible, the facilitator supported open dialogue and flexible topic exploration. Probing questions were posed to enhance sharing. The facilitator refocused group members only when discussion moved off topic, or to insure that all members contributed to the discussion.

Participants received a set of written questions with ample space for note writing and a pen as they checked in to the session. It was made clear at the outset to only use this form as a guide, and participants were encouraged to familiarize themselves with content and make notes as they saw fit. Only one participant made a brief notation on this form. Check in also included verification that the demographic questionnaire and consent documents were completed and returned to the researcher. Each participant received a

nametag to stand on the table in front of him/her to enhance the flow of communication and note taking.

The facilitator initiated each group with a brief introduction, reinforcing the needs for confidentiality amongst members and asking participants to speak one at a time to enhance audibility of the recording. The two research assistants were introduced and their role as note taking observers was reviewed. A modified, round robin format was used to organize initial discussions. To start, each participant was asked to state his/her name and tell the group how long each had resided at Lasell Village. The facilitator then asked the first open ended question, **Describe for me what it has been like for you to retire here at Lasell Village.** The facilitator insured that each participant who wanted to had an opportunity to respond. Discussions continued until all topic areas were covered.

Upon completion of each focus group, the facilitator and research assistants documented detailed field notes to capture any process observations that may not be evident later in the transcribed content. Any additional observations were also added to the notes that were taken. Tapes were transcribed verbatim using the notes and field notes to insure accuracy. Additionally, transcriptions were audited for accuracy by comparing the typed text to the original audio recording. Each focus group transcript had a minimum of fifteen minutes of content audited in this manner with any discrepancies being noted and corrected. Participant names were changed to a pseudonym that was used throughout the analysis and write up of this research.

Overview of Analysis

The primary source of data for this analysis was the transcribed data from the focus group sessions. Krueger (1998a) suggests that using transcripts, while being a more time intensive method, is also the most rigorous method to analyze focus group interviews. Transcripts were prepared using HyperTranscribe and data management and analysis was completed using HyperResearch computer software programs. Computer-aided analysis is useful when analyzing large amounts of textual data, and to enhance tracking of analysis procedures (Creswell, 2007; Krueger, 1998a). In this study, transcription produced over 300 single spaced, word-processed pages of data.

The following steps, set forth by Moustakas (1994), and simplified by Creswell (2007), were used to analyze the transcribed data:

1. Throughout the analysis, the researcher continually made explicit his personal experiences as they related to the phenomenon. This took the form of field notes and memos.

2. During the initial passes through the texts, significant statements were identified and highlighted, and coded with specific thematic codes. In this early phase, 350 individual codes were generated.

3. Significant statements were then clustered into chunks of information or themes. Specific codes were then collapsed within these themes bringing the total codes down to about 100.

4. Themes were substantiated with verbatim quotes, to develop a complete description of the phenomenon.

5. The researcher used this description to begin to interpret underlying

    meanings and the essence of the phenomenon was written.

Once qualitative data was initially coded and preliminary analysis was complete,

a member checking session was held at Lasell Village. This session was open to the

entire Village community with 47 residents participating, 19 of whom were participants

in the original focus groups. This one-hour session afforded me the opportunity to present

initial findings. The purpose of the presentation included audience discussion and

comments regarding any misrepresentations or inaccuracies (Creswell, 2007; Krueger,

1998a; Sandelowski, 2000). In an effort to support the rigor of the research, member

checking allows the researcher to confirm that the interpretations are consistent with the

participants' perceptions of the phenomenon. This is one practical step in the hermeneutic

stance of negotiating the knowledge and affirming the meanings derived from the

research. During this member checking session, one interpretation was challenged, which

is fully described in Chapter Four.

Data management. Demographic factors were analyzed using applicable

descriptive statistics using the Statistical Program for Social Scientists (SPSS) to describe

the overall sample. Each group had a case file entered into HyperResearch software

program. Individual transcripts from the focus groups, comments from the telephone

follow up, and personal demographic responses were be uploaded into this file. The

software was used to filter significant statements and develop an initial coding structure.

Codes were applied within and across groups allowing for a range of sorting options.

Initial coding schemes were collapsed into themes to generate a coherent representation

of the lived experiences of these elders in the context of higher education.

   Rigor. The tenets of insuring the reliability and validity of findings to support the

generalizability in quantitative studies, has little applicability in qualitative research

(Creswell, 2007; Moustakas, 1994; Popay, Rogers, & Williams, 1998; Sandelowski,

1993). Lincoln and Guba (1985) argue that trustworthiness may be a more appropriate

measure of qualitative research integrity than other formulas more consistent with

quantitative methods (e.g., validity and reliability). As such, it is imperative that

qualitative research be designed to insure trustworthiness. In this study, I incorporated

recursive coding, memo writing, member checking, and multiple coders to insure the

rigor and protect the integrity of these findings (Sandelowski, 2000). The researcher and

each of the research assistants coded one section of the transcripts, representing ten

minutes of recorded time, separately. Coding schemes were compared with relative

consistency noted across coders. Discrepancies were questioned and discussed to refine

codes and develop consensus for future coding. Qualitative analysis is an iterative

process (Creswell, 2007; Krueger, 1998a; Sandelowski, 2000). The researcher, to insure

that all substantial codes were noted, repeatedly and exhaustively reviewed transcript

texts.

Summary

   This project employed a phenomenological approach to study the lived

experiences of elders living and learning in the context of higher education. The

philosophical stance of this research included an interpretive role played by the

researcher. Through this approach, I attempted to describe not only the experiences of participants, but also the meanings behind them. This required that, as the researcher, I be fully engaged in the research process, using my own experiences with the phenomenon to guide the research and interpretation of data. Multiple steps were in place to promote the rigor of this study including memo writing, recursive coding, member checking, and the use of multiple coders. The anticipated result is a clearer appreciation of the value and meanings that these elders ascribe to their ability to age successfully in the context of higher education. The results of this study clearly have the potential to impact the design of future living and learning environments for elders, and may influence future public policy initiatives.

The coding resulted in two major thematic categories for this study. The first, described in Chapter Four, is the role that the Lasell Village program plays in promoting the successful aging of participants. As discussed in Chapter Two, successful aging is conceptually complex, which is confirmed by the findings of this study. The next major theme, presented in Chapter Five, includes the participants' perceptions about intergenerational experiences at the Village. This separation of the findings into two separate chapters is necessary to help manage the large volume of results and is consistent with the aims of the study to explore: 1.) the context of higher education in relation to successful aging; and, 2.) the impact of intergenerational engagement on successful aging.

CHAPTER FOUR

Successful Aging on a College Campus

Focus group transcripts were analyzed in order to generate the findings presented in Chapters Four and Five. Each of six focus groups was held in a small, comfortable, air-conditioned conference room at the continuing care retirement center under study. The participants were residents of Lasell Village, which meant that they were required by facility policy to engage in a minimum of 450 hours of continuing education annually. As noted in Chapter Three, the facility acknowledges many activities that qualify as continuing education hours. The options for continuing education fall into the two categories of either being intergenerational or age-segregated. For purposes of this study, I did not focus on how each participant collected their individual education hours. Rather, I asked participants to self identify if they mostly engaged in either intergenerational (on the college campus) or age-segregated (Village based) classes. The subsequent findings are the result of four groups (n=22) in which members preferred age-segregated education, and two groups (n=9) with members preferring intergenerational education. Each of the 31 participants in this study was a member of only one of these six groups.

The analysis of the data revealed a preponderance of information in two areas. The first, which will be presented in this chapter, is information regarding the role that the context of a college based continuing care retirement community (CCRC) has in supporting the successful aging of residents. Four themes emerged from the data: 1) participants' perspectives of the situations and circumstances that preceded enrollment in Lasell Village; 2) residents' thoughts about how the setting of Lasell Village impacts

their aging on a day to day basis; 3) insights and perspectives of spiritual factors that impact their dealing both with death in the community and ultimately facing their own death; and, 4) perceptions of intergenerational programming at the Village. The first three themes are covered in this chapter, the final theme in Chapter Five. This separation of findings is consistent with the aims of this study to increase both our understanding of successful aging on a college campus (this chapter) and to consider the affect that intergenerational engagement has on aging (Chapter 5).

The Cocoon Analogy

As I analyzed the interview findings, I was struck by a topic of discussion that was raised across each of the focus groups. Participants discussed the impact of the microcosm of the college campus and the CCRC setting in each of the six groups. The term "cocoon" was consistently used to describe this perception. As Sam suggested, "It's very comfortable and I can describe it as a cocoon. You really don't have to worry about the outside very much. I think the attitude here it's a very positive one." This sentiment was initiated in another session by Penny, "Well, it's, I guess, the first thing is the school, the education aspect. And, then the people; they're all just wonderful. And, the care that you can get here if you need it. It's kind of like being in a cocoon again. Really, it truly is."

The first time the term was used, I was a bit taken aback. I was expecting to hear that living in the midst of a vibrant college campus would help elders to feel less isolated and segregated from the world. To me, the idea of a cocoon sounded very separate and alone. However, in order to clarify my potential interpretation, I challenged participants

with my initial perception. Participants were quick to clarify that the intended meaning

was more inclusive than isolative. First, the cocoon, in their definition, was a group

cocoon, including all members of the Village community. Additionally, the key to the use

of the term "cocoon" centered more on the opportunity for metamorphosis than on the

walls of the cocoon. It became a rather eloquent description to consider the facilities and

programs of the Village, as a place of support and nurturance necessary to transform

one's being. The symbolism embedded in this metaphor is quite exquisite, that this is a

place where individuals evolve from a drab caterpillar to a beautiful butterfly. Luckily, I

had not relied on my initial misperception to understand this aspect of the discussion.

A few participants raised some debate that the term "cocoon" might connote a

negative meaning of isolation and withdrawal. In the following quote, Eliza seems to

interpret cocoon as confinement:

> I don't think of it as a cocoon. I think of it as a supportive staff who helps
>
> us if we need it and the people who can, can function without it, fine. But
>
> you do know it is there because you see it supporting other people. And I
>
> had a different experience because my mother was at [another] continuing
>
> care community and it was so successful for her… But I don't think, I
>
> don't, I am looking at a chair because I have to sit high and the only way
>
> to get it is to go to an electric one and my objection to it is I feel like I am
>
> in a cocoon. That's exactly how I described it and I don't like it.

In spite of the fact that a few participants like Eliza raised concerns with the use of the

word cocoon, most agreed that it aptly described the nurturing role that the setting has

played in their lives, and a general consensus emerged that there was not a sense of isolation or confinement living at the Village.

In addition to the sense of nurturance, participants described a profound sense of security and safety living within the Village. This quote from Trish challenges the negative connotation of cocoon and describes it more positively:

I think for me cocoon in the sense of, I'm sort of protected in case something goes wrong you don't have to worry. Someone is here all of the time if there was an emergency. I came from New York City, I did have some health emergencies, and there was a question of either calling an ambulance or going to the emergency room. Things are taken care of here. You don't have the responsibilities. Of course, you have the responsibility of making a new life for yourself when you get here and maintaining it. You just can't sit back. But they make it so easy to take advantage of all kinds of things. So that you never can be isolated, and in that sense it's so available to you and you have the opportunity to make of it what you want.

So, for Trish, more than just providing a sense of safety, there is also a richness of opportunity available to insure that one does not isolate within a cocoon, cutting oneself off from the valuable connections that the community offers.

Sam defends his use of the term "cocoon" in similar fashion, but he takes it to a more basic level, seeing the environment as nurturing and caring in his hour of need:

The cocoon, excuse me, cocoon doesn't apply to everybody here. There

are people here that work on the outside that spend part of their time living

in other places. Some people come here almost every week for a few days

and go elsewhere for a few days. But for some of us, a cocoon I think it

biologically is an environment that exists to support the animal that's

inside during a period when it's fragile and needs help.

At 93, Sam described entering the Village two and a half years earlier after, "my health

began to deteriorate and, by 2005, I was unable to volunteer and could go only to rare

classes or plays." Sam seems to perceive entering the Village as a relief of his strain to

maintain his independence in spite of his failing health.

Mike summed it up a bit more fully, highlighting the opportunities for

development within the nurturing environment of the cocoon:

But, I think that the positive side, the positive twist to the cocoon, is that

there is a level of safety in the cocoon and there is also time to develop

and grow when you're supported in the cocoon. And so, I think that, that

growth is really the positive side. So and so even though we physically

may be staying on site, we're still growing and changing because of the

interactions that we're having here. That's what I am hearing anyway.

That's what it sounds like to me.

Adam: I can't wait for you to turn into a butterfly. (laughter)

The salient aspects of the cocoon metaphor then are that within the Village (cocoon) there

is support for one's frailties; safety and security, and a caring environment rich with

opportunities to develop and evolve. What is also clear from these descriptions is that the Village is not perceived as causing isolation and segregation from the world at large.

The cocoon metaphor was widely accepted during the process of the focus groups. The term "cocoon" worked well to describe the supportive Village environment that fosters development. The metaphor was not so well received at the lecture (member checking session) I gave to share preliminary findings. I received many comments from the 47 attendees (19 of the original participants) related to concerns that the word cocoon made it seem as if residents were cut off from the world. Attendees in this session discussed alternative analogies (nests, hives, etc.) to no avail. As such, it seems that the concept of metamorphosis most aptly fits with the experience of participants' entrance to the Village and becoming engaged in the supportive and enriching community. Perceptions shared by the participants in this study reveal that upon entering the Village, an active transformation of residents occurs.

This analogy of the Village as cocoon, serves as the organizing framework for this chapter. Consider for a moment the lifecycle of a butterfly. In the larval stage, the caterpillar forages for leaves to eat so that it can enter the pupal stage. This stage is analogous to the elders toiling with day-to-day demands prior to entering the retirement community. The cocoon forms around the caterpillar while it is nurtured and actively transformed within the chrysalis until the metamorphosis is complete and the butterfly emerges (see Figure 3).

Figure 3

The Lifecycle of a Butterfly

BUTTERFLY

LARVA
Caterpillar

Metamorphosis

PUPA
Chrysalis
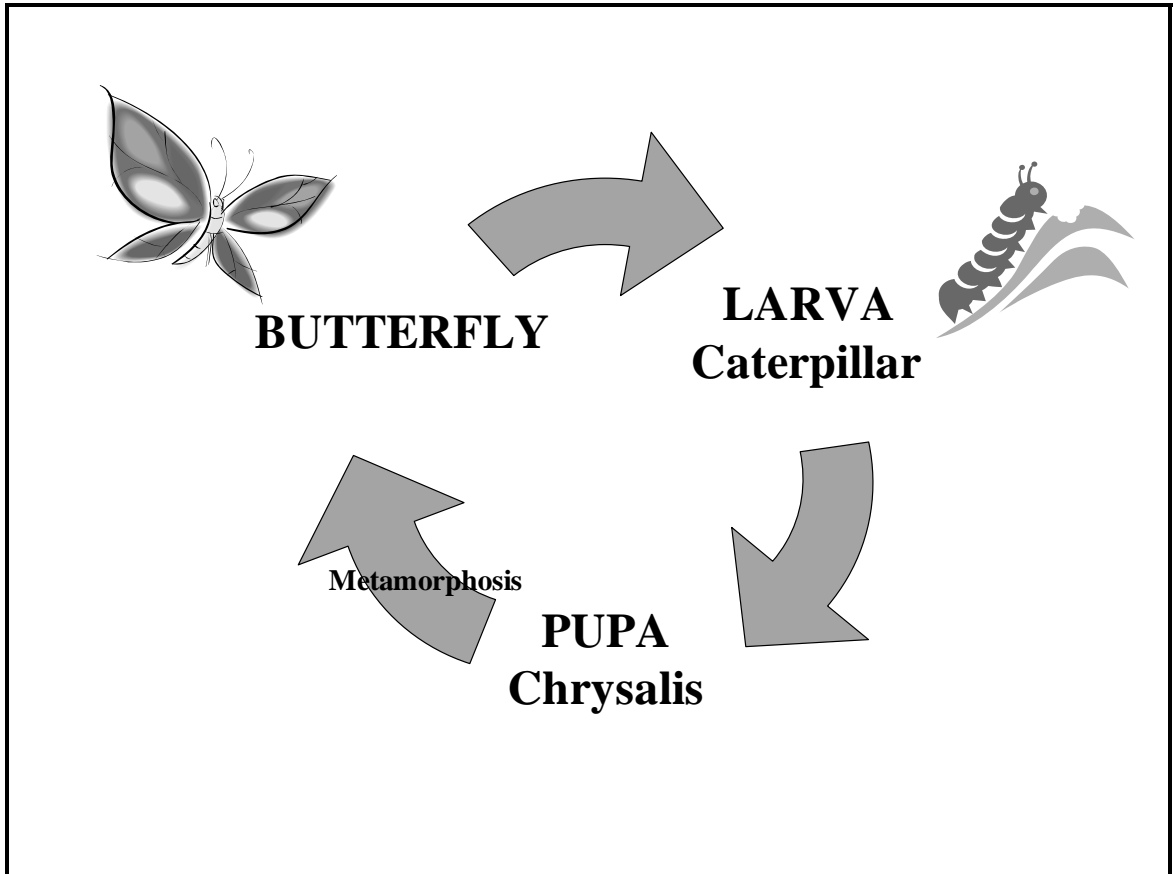
Upon entering the Village, residents are now protected by the cocoon within which they can develop and transform. Then finally, once metamorphosis is achieved, the residents will transcend their earthly being and evolve into death. At last, free to spread their new wings and soar in the sun. Using this analogy, we will first consider the issues in the pre - Village (caterpillar) phase by exploring participants' decisions to enter the Village. This leads us to investigate the processes of living and learning in the Village (cocoon). Finally, participants actively address issues of death and dying within the community (the ultimate metamorphosis).

The Decision to Enter Lasell Village – the Larval Stage

In spite of the fact that there was not a specific question in the focus groups related to the decision to enter the Village, most participants chose to share their story of the experience. It seems that it is impossible to consider what life is like within the CCRC, without having an understanding of how it came to pass. It is through these descriptions of the decision to make the transition that we can begin to appreciate how multiple aging issues precipitated entering the Village. While the details of each story differ in circumstance, the participants' stories clearly reflected similarities and commonalities.

Care and maintenance of the home becomes too much to manage. It is well established that the aging process often imposes increasing demands on individuals. This often results in deteriorating health and increased difficulty carrying out even routine home maintenance and self care tasks. This reality was expressed by many of the participants as they described the factors that influenced the choice to enter the Village.

Many described that the upkeep of a large home was getting to be more than they could

handle, recognizing the need to downsize. Doug was emphatic about the contribution that

household chores made to his decision:

> I found my life on the outside rather, you know, tedious with all of the
>
> housework, you know, indoor and outdoor chores and I was delighted with
>
> the ability to just come here and not have to worry about maintenance,
>
> inside or outside, at least not often. I was truly burdened by a large empty
>
> house. I looked for a life care community that would relieve me of the
>
> worries of maintenance as well as future anxieties about medical care and
>
> expenses. The Village fit both bills.

It is interesting, given the earlier discussion of the cocoon, that he refers to life before

living at the Village as 'life on the outside.' Reflected in his description is the sense that

there is a substantial difference before and after making the decision to enter the Village.

He refers to this demarcation in absolute terms; life outside is stressful and unnecessarily

burdensome, while life inside the Village provides freedom from mundane chores and

anxieties.

Throughout the interviews, there are multiple references to downsizing being an

important part of the transition. Sam described the transition, "I was living in a

condominium of 2650 square feet, doing my own shopping, cooking, etc... At Lasell I

live in 770 square feet and never cook…" While there is clearly a sense of loss with this

transition, none of the participants seemed to dwell on this aspect. Most described it as

worth it to move into the next chapter of their life. Natalie had a particularly interesting experience as she sought to downsize in preparation for moving in:

> Yes, and I gave away my precious piano. I thought I would not be using it anymore… Before I moved here, and I took it back (laughter) after moving here. I found, I didn't think I'd have room for it in my apartment, it's a parlor grand, but I do. And it's fine there. So I've been very happy and very satisfied - and progressing upward ever since I moved in here.

Since moving to the Village she reports using the piano to teach and direct a choral group on campus. Her reference to 'progressing upward' may indicate that as she has taken on new challenges and roles with her piano, she has continued to evolve. What began as a group of friends singing rounds, became a celebrated production of The Mikado five years later.

Some, as in Ida's case, described downsizing as a process that evolved over time, "I had downsized quite a bit before, before I had to come here. Not had to come here, before I came here." Mike too saw the process elapsing over years, "several years ago, my wife and I decided to—the house was just too big." Being overwhelmed with household chores likewise resonates in theses comments from Irene, "The house began to require too much upkeep." And Penny, "…we lived in New Hampshire on a large piece of property. I could see that it was getting too great for us to take care of. We talked it over and decided to look into the prospect of moving to a retirement situation."

These descriptions suggest that in response to difficulties managing everyday task demands, participants sought alternatives to caring for the often empty nest. This toiling

contrasts sharply with the frequent references to the Village being a place for 'easy living.' It appears that one of the benefits of selecting a CCRC setting for these participants is the relief from daily chores.

Confronting health problems, or death, of spouse contributes to decision. For many of the participants, the decision to move into Lasell Village was not made alone. A number of participants were currently married living with their spouse at the Village. Additionally, a portion of the participants described in Chapter Three as being widowed, experienced the death of their spouse after moving in. Lina poignantly describes her decision to enter the Village, initially because of illness, and then in the aftermath of her husband's death:

> I lived in California; my husband was ill and my daughter and I looked
>
> into possibilities of living close to her in Newton. I applied to Lasell
>
> Village in 2002 and was informed on April 9th, 2003 that an apartment
>
> was available. My husband had died the day before, April 8th. The
>
> decision to move was made in the midst of grief and loneliness. In a way,
>
> it accelerated my desire to be with my daughter and her family.

Joyce describes leaving the home and community she resided in for over 50 years, only after the death of her husband, "My husband had passed away, and I was living in a very large home, five bedrooms, where I had reared my family. I had lived there since 1950." In both these examples, the decision to enter the Village community was predicated on feeling alone and perhaps isolated. These participants described multiple factors that lead to CCRC entrance. Like Lina, Olga, whose infirmed husband was almost ten years older

than she was, sought assistance from the facility to manage his ever increasing demands

for care. Others sought the less tangible social support of the community setting, as a

means to manage their sense of loss.

Confronting own health problems contributes to decision. For some participants,

it was their own failing health that mainly contributed to the decision to enter the Village.

Betty addresses this, "I was preparing for back surgery, and recognized that I could no

longer live alone. While researching alternatives, I suddenly learned about Lasell Village

and went for an interview. …I was a latecomer to the educational aspect." Responding to

others in her group's praise for the educational component of the program, Betty

highlights that her primary interest was getting assistance in the face of her failing health.

Sam describes coping with the loss of his wife, until confronted by his own

declining health. As is true of most human conditions, the factors that impact us do not

necessarily occur in isolation of one another. The cumulative effect of losing his wife and

then losing his health moved him to take action.

> I, my wife died 10 years before I moved in here, but I was very busy. I had
>
> retired and I had a very busy retirement, volunteering and taking courses
>
> and what not. And then my health began to deteriorate and I wasn't able to
>
> get out and I really became aware of what loneliness means. And I find
>
> moving in here, it's a very good place for easy living.

Kathy shared a similar experience after the death of her husband:

> Well, I lived alone for about a year after my husband died and then I
>
> passed a kidney stone and I suddenly realized the implications of being all

alone and not really being familiar. We just moved to Watertown a couple

of years before while my husband came here for treatment. And so friends

from Evanston, Illinois, where I used to live, told me that they were

moving here, and then a woman that I had met on an elder hostel trip told

me she was moving here. So I decided that this was the place to look into.

In both of these instances, it appears that the immediate health crisis acts as the proverbial

straw, shattering the coping mechanisms that had been established to manage the loss of a

spouse. There is a sense from participants that had it not been for the acute health issues,

perhaps the decision to join the community would have, or could have been postponed.

Proximity and access to family contributes to decisions. Many of the participants

described making significant geographic relocations to come to the Village. Participants

moved to Massachusetts from New York, Pennsylvania, Virginia, South Carolina,

Georgia, Florida, Illinois, Wisconsin, and as far away as California. Most of these

described spending little or no time in the area prior to moving. Being closer to family

was consistently described by residents who had moved from any distance as a

significant aspect of their decision. While many also described the educational program

expectations as part of the appeal, it is unclear that anyone would have made such a large

move if not for increasing access to children and grandchildren.

The cumulative effect of age-related health concerns and losses take a toll on

concerned family members as well. This is reflected as Eve discusses how the demands

of life prior to the Village resulted in her children 'insisting' that they move closer.

Well I came here, because our children insisted that we live near one of

them. We had both had serious illnesses, and it was getting to be a

problem for them to visit with us. So we decided to try to live near my

daughter…and she actually found Lasell for us, and was very fortunate in

getting us the last available apartment. That was two years ago... education

has always been very important in our family. And she thought that this

would be absolutely the most ideal spot. … It has been a fabulous

experience. Not because it's near my daughter at all, because we don't see

her that often. But the fact that they do have this education program has

meant an awful lot to us. And we have met some very interesting people

and made some extremely nice friends. And all in all, I would say it's

totally satisfactory. In addition to which, we are near very good medical

facilities which is an important consideration for us at this age.

Eve's description captures the process of many participants. Illness triggered concerns

and distance from family complicated access for care and support from children. The fact

that her daughter 'found' the place is not uncommon with these participants, many

described moving in sight unseen. And while this need for proximity and care is being

met by the facility, participants add that it is good that they also have this educational

program.

In spite of this desire/need to be close to children and family, it is just as

important not to be a burden. As such, the care options of the CCRC setting were also

appealing to participants. Based on past experiences, Trish makes it clear that not burdening her children played a key role in her decision,

> I, again, from my own experience of my mother, having seen what she did
>
> to, she became totally dependent mostly on my sister, and I was
>
> determined I was not going to do that to my kids. My mother would tease
>
> and she would say this is what you have children for – to take care of you,
>
> and I couldn't stand that. That's not why I had children. I, I wanted them
>
> to have their own independent lives without having to worry about me.
>
> After all, it's my life I am responsible, for as long as I can be. And being
>
> here, there is this support system that I need.

It appears that, for Trish, not being a burden to her children is another way of saying not being like her mother. For her, knowing that there were supports in place to take up that burden relieved her of this concern.

> Even though they already lived in close proximity, Barb adds to this discussion that her children experienced relief when their parents made the decision to enter the Village.

> When we called our kids and we told them that we had signed up for this
>
> senior retirement center, they were thrilled. They live, they're twenty
>
> minutes away and thirty minutes away. And each of them has had an in-
>
> law who has had problems or has since died, but uh, it's been...they were
>
> just thrilled that we were here. So that they knew that they didn't have
>
> same need to take care of us.

So, in a similar fashion to Trish, Barb uses past experiences with caring for elder family members to justify the benefit of avoiding a repeat of the situation. Sam concurs with Barb in terms of the benefits that his children enjoy, "There is another benefit that derives from living here and that's to our children, who are, once we come in here, are greatly relieved that whatever anxiety they have about our safety and health and welfare." In direct opposition to the potential for the participants' aging issues to burden their loved ones, the decision enter the Village provides relief to their children.

It would appear from the following exchange that not being a burden on children is more than just protecting the children from this hardship. The desire for autonomy and self sufficiency seems paramount to both Natalie and Joan:

Bob: You mean you don't want to move in with your kids?

Natalie: Heaven forbid – no!

Scott: What are the advantages to not doing that?

Joan: Being an individual. Standing on your own two feet and not being a burden to your children.

Natalie: Yeah, I can make it on my own - and I don't need help. I need them for other reasons, but not to survive day to day.

Thus preserving individual integrity may be as important as not burdening loved ones.

At least two participants described not having any immediate family and seeing the move as a proactive approach to prepare for the potential of needing increased assistance in the future. For Ida, it was a matter of not imposing on her extended family members:

...I had eight nephews in one family, all sons. And I didn't want to be—

ever have them, uh…responsible for me. I didn't think that was fair to

them, and I didn't want to be a burden, et cetera, et cetera. So I started

thinking more seriously about this, and ended up here. ...it wasn't this

place in, in particular, till I narrowed that down, it was the, more a

philosophy. What do I do then? I do not want to be a burden on my

nephews. How do I solve that? Because I have no other relatives or

anything, and one thing led to another.

Olive too had limited family supports and felt it necessary to take steps to mitigate

against this potential liability:

...I have no immediate family, so I was, when I came here I had looked at

a bunch of different communities, and I wanted life care. Because I don't

have anybody who would look after me (nervous laugh) if I got unable to

take care of myself. And uh, the educational program and just the location,

being on a college campus, all of this was very attractive to me.

The alternative of living in continuing care facility appears to compensate effectively for

a lack of family supports for these participants as they face age-related losses and the

future potential need of increasing care and assistance.

Thus, it is clear that either increasing access to, or compensating for a lack of,

family supports contributed directly to the selection of CCRC living. In either case, the

drive for enhanced security and support, without burdening family and compromising

personal integrity, play important roles in this decision making process.

The value of education and attraction to the educational opportunities. Perhaps the most universal finding related to the decision making process is that individuals selected Lasell Village over other options because it promoted/required on-going educational participation. In many cases, where there was a need or desire to consider a CCRC living situation, these participants regarded the educational orientation of Lasell Village as tipping the scales in terms of final choice. Harry is emphatic that the educational program was the sole reason for his interest in the Village setting:

> I would not have come here if it didn't have an educational program…
> Because after I retired, I went to a Westchester Community College,
> because it was inexpensive, and I took all kinds of courses there. And this
> is in addition to my having been to Brooklyn College. And being with the
> students was great because they varied more ages because it was a two
> year kind of a college it had uh a series of various ages. It had young kids,
> old kids, old timers, and it was a great experience. And coming across the
> information that they had this program over here… I am going back now
> prior to my being here for the eight years, but being interested and signing
> up like two and a half years before we finally got here, um, I would not
> have come if here if it were not for the fact that they had this educational
> program which interested me. And has really still does, and still exciting
> for me.

Many of the participants echo Harry's investment in education after he retired. In fact, there was often a sense that the educational orientation of the Village was not particularly

different from routine activities prior to admission. Yet, whether the participant's interest was a post-retirement orientation as with Harry, or more of a lifelong focus, the appeal of the education program at Lasell was very real. Joan summarizes it in this way:

> I think it was the number one reason that I chose to come to such a place as this. In addition to being near my family, of course. That's what attracted me to this particular place. …Because they had an educational component and all my life I was always interested in education and in learning. And, it was a continuation.

Joan's suggestion that this pursuit of education is a continuation is an important component for many of the participants.

Some participants were academics, and thus had spent most of their work life in an educational context. Others had maintained a commitment to education across their adult years. Meg, herself an academic, articulates the general sense of the importance of the educational program in selecting Lasell Village:

> I think having the classes is one of the most important reasons that I decided to come here. I, I have the impression that there is a, there are more interesting people here than the unselected people that would come if, if they didn't have that requirement… People were, are here because they want to learn. And I'm not so sure that all senior citizens fall into that category but they wouldn't come here if they didn't like that particular aspect of the program. And I like the idea that we can take classes both

with the under graduate students, the regular college-age students, or we

can take classes with just Villagers. And I've done both.

Participants were quick to compare the differences between the concept of a CCRC with

an educational program and non-educationally oriented facilities. Since most participants

described shopping around a bit before settling on Lasell Village, there is no doubt that

the educational programs and expectations positively influenced their decision to sign on.

Life Inside the Cocoon: Aging on College Campus

Upon making the decision to sign the contract and enter the Village, most

participants seemed to minimize any difficulties with transitioning into the facility. As

noted above there were some issues with downsizing and shedding material possessions.

Barb talked about having her daughters go through her home and tag anything they might

want. She then decided what she would move, they took the things they had tagged, and

the rest was sold at a yard sale. One factor that seemed to strongly influence the ease of

transition into the facility was the relative homogeneity of the residents.

Self-selection of residents. The similarities discussed above in conjunction with

the relative homogeneity of the participants' demographic profiles and the financial

means necessary to buy into the Village come together to make it easy for residents to

transition into the setting. Residents can take comfort as they look around and are

surrounded by people like them, to whom they feel they can relate. Meg discusses the

general similarities that she has with her fellow residents:

I think that you still are with people that you're used to living with, the

same kind of people. My husband and I were both academics, and so

we're finding many people that have had the same background that we

had. So it's, we're very comfortable but, I, I'm sure you're right that we

might be considered exclusive by some people.

As Meg suggests above, only people who are interested in education and value it enough

to commit to participating in 450 hours per year will choose to come to Lasell Village.

There is some sense that the self selection also has a significant financial component. As

Bob announced in one of the groups,

I'm talking about the upper 1% of the wealthy people in this country. My

wife every once in awhile says everybody can come here. I point out that

in order to buy a condominium, you have to have money, or sell your old

home. And, also, you have to be able to maintain with other income the

monthly maintenance fees.

In many of the group discussions, there was a sense of elitism with regard to the

selectivity of the population at Lasell Village. Participants routinely mention, as in this

quote from Meg, that, "Well we have a large number of Harvard graduates that are

residents here, lots of psychiatrists and lawyers and college professors. I suppose you

could use the word elitism, but I don't like that word." While participants like Meg were

not always comfortable with my provocative use of the term elitism in our discussions,

no one offered an alternative that seemed to better capture the essence of this

phenomenon.

While residents appear to enjoy seeing themselves in the company of their most

professionally successful peers, they also recognize that the selectivity sets the stage for a

uniform status within the community. Most importantly, residents saw this as giving them an equal footing within the community and sense of connection or commonality with others in the community. Barb articulates how the selectivity sets the stage to ease the transition:

> I think before you even get to where the other kids are, the thing that is so great I believe, is the educational requirement. So that narrows down the people who are here. So even though we're not all interested in the same thing, we were interested in that concept. And it gives us a common bond before we even get to know who the people are. So we know we have that.

As Barb describes, regardless of how different someone's perspective or professional background may be, a connection is possible through a shared commitment to the concept of continuing education for elders.

Olive carries this thought a step further giving the educational program credit for attracting the kind of people who make socialization positive: "…And I put double ditto on how wonderful all the people are. Cause I think this place, that part of, that feature attracts people who are very interested, curious, and engaged in what's going on and learning about things." This idea that people at Lasell are more interesting recurs throughout the interviews. In multiple groups, participants described experiences visiting competing CCRCs and entering the dining room – where everyone sat quietly eating. These experiences were described as pleasant enough, but not very interesting. This was contrasted with the robust conversation in the Lasell dining room, Barb reports:

>Look at the difference between the people that are here, or you know what we go over to [competitor CCRC]. And there is no comparison between there. You go into [competitor CCRC], you go into the meals and it's nice and quiet. Then you look around our dining room and everybody is smiling and talking. We realize that there is a definite difference being here in that we love it.

Sadie described a similar experience and went on to suggest that it is an effective marketing tool for the facility:

>Well, you have constant stimulation. In fact, that was a big advantage. Because before we came here [MD, marketing director] - kept inviting us over here, meeting people, having people have lunch with us. Which is a big, big thing to do. Because if you're having lunch with people who are stimulating and intelligent people who are aware of the world. You are much more likely to say, "Okay [MD], I'm in."

Since Bonnie traveled a distance to join the Village, she recounts the same general experience vicariously through her children's observations:

>But when my children brought the brochure, they came and saw the place and brought the brochure and they talked about going through the dining room. And seeing how vibrant and involved everyone in the dining room was. They were interested in the meal, but also what was going on, and they were really vital people.

Reflected in these descriptions is the very clear sense that the dining room is the center of

the community. It is after all the place where the community comes together on a daily

basis making general comparisons and observations possible. It is the site of much

socializing and seen as a source of vibrant, stimulating interaction.

As we explored the factors that contribute to the uniqueness of the setting and

community, Doug identifies the importance of the educational component as a reason for

community selection:

> I think if you want to ask the question, which I think you did ask, "Why do
>
> you think we might be different from other communities," that's because I
>
> suspect it's because the process of selection is you know, some people you
>
> know, the idea of actually having to take courses. I know, I know at least
>
> one person who said "no way, I'm done with that." And so, the people
>
> here, the people who come here tend to be interested in, at least in their
>
> intellectual development and in their physical development, because there
>
> is an awful lot of that going on. You know exercise and balance classes
>
> and things like that.

In addition to highlighting the self-selection process, Doug begins to shed light on the

opportunities for both intellectual and physical development within the community.

Inherent in his comment, and as consistently reflected in each of the groups, is that this

educational philosophy might not be a good match for everyone. It is unclear if this

further perpetuates an elitist orientation ('we are different or better because we appreciate

the role that education plays in our successful aging') or if it simply represents an

important programmatic reality. Either way it is clear that it is a widely held opinion across participants and across groups that the educational program provides opportunities for growth and development within the setting.

Self-selection leads to limited diversity within the community. A few participants raised the observation that the sameness in the community might make it easier, but not necessarily better. As Meg succinctly suggests, "But what I'm saying is that we're… It's not a diverse community, either financially or ethnically." It is interesting that she equates ethnic diversity with financial status. She seems to be suggesting that the whiteness of the community is related to the socio-economic requirements for entrance into the facility.

Wanda addresses her experience as a loss of diversity that she enjoyed prior to coming into the Village community:

> I find living here interesting and uh. I have to say though that it's a very,
> how shall I put it? A very scrubbed atmosphere. In the sense that people
> here are white, at least middle class - I wouldn't say upper 1%. They're, to
> the best of my knowledge, I don't see any homosexuals. I don't see any
> deviates of any sort. Maybe there are, but I don't know them. And I find
> that different from where I was living before…because the house I lived in
> was right next door to a black couple.

Wanda hesitated, perhaps in an attempt at being politically correct, to identify this difference as positive or negative for her. Based on her careful selection of words, she is

challenging some of the other group members by suggesting that the elitism (top 1%

reference) in the community is not such a good thing.

A couple of participants (Olive and Lois) identified the lack of diversity in the

community and suggested that community members need to be proactive to insure that

they are not overly insulated from the world at large. Olive suggests:

Another thing I think is important is not just take classes here, but to reach

out into the community. And I've done some of that too. You know just to

see different people, get different ideas and so on. I think it's a good

balance…through my synagogue for one thing. They have several lunch

and learn programs. They have a choir and so on. So, I like that idea - not

just here…but maybe reaching out into the community gives you

a...another point of view. A taste of a little bit more diversity. Just a little

bit of variety. I like that.

While one might wonder how diverse the membership of her synagogue is, for Olive it

represents a fresh perspective on the world, not always available within the Village

community. Lois expresses a similar sense of compromise of her concern about joining

an age-segregated community, while seeing the college campus and the location as

accessible to more diverse experiences:

Well I didn't really want to be in a community where everybody was over

70. Uh, you know I thought it would be nice to be close to a town, to have

activities, places I could go to meet a variety of different people. And I

love the, I've been teaching at a college for the last 15 years so I like that

environment too.

Attempting to find balance is important to some participants to make up for the

homogeneity of the community. This by no means was a universal experience, as many

seemed quite comfortable to accept their good fortune and enjoy its rewards.

In a related discussion, one group took the issue to the level of society rather than

dealing with their individual responses to the level of diversity within the community.

When directly questioned about whether the lack of diversity in the Village was a

problem for her, Mia initiated the following interchange:

Mia: No, it's not. I'm delighted to be part of it.

Scott: So you consider yourself lucky to be in the well-to-do category.

Mia: But I think it is a terrible disadvantage for the society.

Scott: Socially?

Mia: Socially, it's a disaster to tell you the truth. You know I've had

enough experience to know what happens in nursing homes, which are

paid for by Medicaid, and it's not a very pretty sight.

Alice: Well living at home wasn't either.

Mia: What?

Alice: For those people living at home wasn't pretty either.

Mia: No, you're absolutely right. It wasn't. So I think, yes, I'm lucky to be

here.

Bonnie: Yeah, I never had it so good.

Mia: I wouldn't say that.

Bonnie: That's the way I feel.

Donna: Being catered to is part of life. I mean if you can afford things,

you're lucky.

Mia: That's certainly true [Donna].

Donna: You have these advantages. We can try to promote it for less

fortunate people.

Mia: But, that's not the ideal situation, that we only cater to the wealthy.

It seems that potential guilt is replaced by gratitude for these participants who recognize

that the level of affluence required to enter the Village precludes access to most of their

peers. Seeing it as a social issue may allow these participants to keep the issue at a

distance and not to have to personalize it.

As described by the participants of this study, the self-selection factor of the

community is prominent in a number of ways. Residents' common investments in

education serve as a filter to determine membership in the community. This forms a bond

between residents that both actually and perceptually makes members feel connected and

provides a sense of satisfaction about their achieved status. In many practical ways,

especially in the dining room, residents also use this bond to facilitate social interactions

with other residents. Participants were quite aware of their good fortune to be part of this

selective community.

Lasell Village promotes easy living. All one has to do is to enter the facility to

have some appreciation for this area of discussion. Entering the main lobby with the

library area, chandelier and the main desk, one gets the sense that one might be checking in to any major hotel. The facilities appear clean and well maintained both inside and out. The people that one encounters are friendly and engaging, both residents and staff. So how then do residents see this atmosphere contributing to their ability to age well?

Throughout the interviews, it is striking how many references there are to cruise ships and hotel accommodations. Lina uses the hotel analogy when describing how being at Lasell has bolstered her sense of independence:

> I feel it is very independent, sort of like a hotel. It's more like that to me or you know. …It's a very nice place to come home to. We all have our own special things that we enjoy. We enjoy a tremendous amount of privacy. It's not a situation where people just barge in. And people are very respectful of your privacy, but they are also very available. So if you just wanted to be chatting, you just have to walk out. There are always very interesting people around, or there will be in the next 10 minutes (chuckles).

In this description, Lina points out that privacy does not equate to isolation. While she feels free to come and go as she pleases, she seems reassured that people are always available as well. Eliza clarifies that one of the reasons why it is easy to feel connected, "Especially in the winter months. You know, I mean there isn't a problem here getting anywhere. If the weather is that bad, all the buildings are connected. The, the design of it. It's very user friendly." Individuals can live in their own apartments in their own buildings, while being accessible to every other building. This is magnified according to

participants by the relatively small size of the Village. It is not so sprawling that residents

feel disconnected from certain areas or buildings. As will be seen in Chapter Five these

walkways do not extend to the college campus buildings.

Many participants described amenities of the facility as luxurious. Bonnie equates

this notion to the dining facilities, "Even take the dining room, which is wonderful. It's

like being on a cruise ship." It would seem that the facilities are more comfortable than

her previous apartment in New York City, as she stated above that, "I've never had it so

good." Like Lina, Bonnie is equating living at the Village in vacation terms. This may

relate not only to the physical facilities, but also, as was discussed earlier, to the relief of

not having sole responsibility for care and maintenance of the home and day to day tasks.

Bob and Natalie capture the essence of the vacation like freedom that the facility

supports in the following exchange:

> Bob: One of the advantages here, over in simplified living. We found
>
> running a big house, when your children have left and your grandchildren
>
> have left, and you're there. And every time you call somebody to change a
>
> light bulb - he'd either died or retired. And today, you simply pick up the
>
> phone and say, "maintenance" and it's fixed. That simplifies life
>
> considerably.
>
> Natalie: Also, I used to have to cook. I used to have to shop. I used to have
>
> to clean. That's all taken care of here. We can devote our lives to more
>
> important pursuits.

So, similar to a good vacation experience, it is not just the relief from the day-to-day drudgery that is important. What seems more important is the transaction that occurs. The individual is unconstrained, free to replace the routine tasks with other interests and activities that might be more satisfying and meaningful.

As Lois points out when asked if her lifestyle has changed, the activities and priorities might not be that different from prior to living at the Village:

> Yes, it did - it's all right here. I swim everyday. I did then, but I had to go somewhere to get it - but here, it's right here, it's all here. It made it easier for me. I didn't have to clean the snow off the car and worry about the roof or whatever; I could be concerned about other things.

For Lois, the mundane tasks of cleaning the snow off the car and driving to the pool can now be replaced with extra time or energy in the swimming pool. If we extrapolate this out, the extra time and energy may result in an improved cardiovascular work out, which may ultimately have direct health benefits for Lois. Certainly, the relief of added stress and worry has potentially favorable health benefits.

Max too sees himself selecting similar activities as before, here in the context of easy living:

> …it's so easy here. It's not that, it's not that I wouldn't be going to lectures or I wouldn't be taking classes or I wouldn't be listening to concerts but it wouldn't be this easy. I couldn't do it as much. For the easiness is twofold. One is that because I don't have to put so much time and energy into maintaining my home and doing my homemaking and

keeping I don't have, I am freed up. I have more energy to engage in this

stuff and while I have that energy, it's right here. It's so easy to take

advantage of it.

As Max uses the term freed up and extra energy, it is easy to speculate that he may well

get more out of the lecture content or concert by not having to hassle with transportation

or other complications. While the quality of his participation may improve, he also

reports that the quantity of his participation has increased.

Mia sums up this section by considering the availability of easy living contexts in

more traditional elder living settings:

Well you don't have these kinds; the same kind of luxurious living that we

have here most places...well the pool is not a huge expense. I think more

the…The dining room - also, the apartments. The size of the apartments. If

this were being paid by Medicare you would have six people in my

apartment. So the space around you is I think what I am saying. We have

our apartments cleaned every week…and we have a nice dinner put in

front of us every night. Sometimes it's nicer than other times.

Mia and the others make it clear that easy living means more than just comfort. While it

is described by participants in terms such as luxury, it equates to a freedom of purpose in

order to pursue the activities and occupations that are meaningful to the individual. In

spite of the occasional concern raised about various rules necessary for institutional

living, and thus loss of personal freedoms, there is still an overarching sense of freedom

to set priorities and engage in that, which is personally meaningful. This is afforded by

the institutional supports that promote easy living made possible by the availability of daily meals in the dining room, weekly apartment cleaning services, access to maintenance services, the physical layout and quality of the facilities and fixtures.

Socialization is a key strategy to successful aging. As has been frequently highlighted thus far, the dining room plays a central role in the community life of Lasell Village. Much of the discussion already outlined emphasizes the opportunity for vibrant, social engagement during meal times. Since much of the focus group discussion related to socialization centered around the dining room as well, it will also serve as the centerpiece of this portion of the analysis. Penny gives us some insight that the opportunity for socializing during meal times is something that the administration is aware of and attempts to capitalize on:

> If you go to plays, if you go to lectures up here, it all goes into it [meeting the educational requirement for 450 hours]. And the physical, the exercise classes count, because it means you're not sitting alone in your apartment brooding. …That's one of the reasons… I'm head of Food Committee, they came up with why couldn't they get the take - out without the fee. Well, what [administrator] said was if you want take out and you want it delivered it's $5. [She] said that they don't want people to get take out and if it's for nothing they're going to take it. They [administration] want them down in the dining room. They want them [residents] socializing. …That's all part of it. They don't want them sitting up in their room eating all by themselves all the time.

Therefore, it appears that by design and administrative policy, efforts are made to encourage residents to take advantage of the meal times to socialize and engage in the dining room.

The facility has set another policy designed to promote maximal socialization at mealtimes. It has mixed impacts. Meg describes it in positive terms:

One thing that is good about Lasell they – that is not true of some other facilities…is that we may eat with anyone that we wish at dinner. Some of these, of these institutions, you're assigned a seat and you have to sit there. And I wouldn't like that at all.

As is a general theme of this facility, the freedom of choice is emphasized around the dining experience. While as a general concept most would agree that freedom and autonomy are good things, each group also explored a couple of the negative consequences of this policy.

The first problem with this open seating arrangement is that it requires residents to make plans for dinner each day, and if they are going to be more than five diners, they must also make a reservation. Participants consistently referred to this process as having to make dates for dinner. After eight years living at the Village, Olga describes both sides of the process:

You have to make dates for dinner but then it, it's hard to make them for every day, and it's some days when I just come down and you usually find somebody to eat with. But, you could go to the café, which is a little more informal dining, but, uh, uh, in a way, this is a little bit of a nuisance. The

longer you are there, the more it becomes a nuisance (others express

agreement). Yeah…this constant having to make date, dates for dinner is a

real pain. But it is better than what I have seen in other institutions where

the same peop – four people eat together everyday. Because this is much

more stimulating and, uh, you know, it's better for our brains.

The opposing perspectives are obvious in this description. On the one hand, it is a

significant hassle to call around to see who might be available to dine with seven nights a

week. As Olga says sometimes to avoid the hassle, she just takes a chance that someone

will join her there, or she accepts the alternative of dining alone in the café. The trade off

however, is being stuck at the same table with the same people each and every meal.

Assigned seating is seen as not only less desirable than the open seating, but also less

intellectually stimulating. Most participants were in agreement that making dinner dates

is a hassle, but it is better than an assigned seating arrangement.

The other negative consequence of the open seating plan is that certain individuals

are consistently left without dinner partners. This issue was raised when I questioned

whether there were cliques at the Village, Natalie responded:

It's not strong, but it exists. For instance, we are free to have dinner with

whomever we want. And, there are many people who insist on eating with

the same people every single night. So they become a clique. …And that's

a problem. It really is. It gets to be a problem because some people are

constantly left out. And, it shouldn't be that way. I don't know. I wish there

were some way of including everybody, in an invitation at some time or

another. I don't know how it's possible. But, we have what they call a

Captain's table, and that is for the people that are left out that night. But

you see the same people eating there every night, you know - it's not right.

This aspect of the dining room is troublesome to many of the participants. Some raised

comparisons to cliques in junior high school. The Captain's table (yet another cruise ship

reference) serves as the safety net for anyone who has not arranged a dinner date. On the

other hand, the cliques may form in order to avoid having to make daily dinner dates – so

it becomes something of a circular argument. It becomes easy to appreciate Natalie's

sense of frustration and suggestion that it might be impossible to resolve, and to see the

situation as futile.

Multiple participants discussed how important the ability to make new friends in

the facility has been, and how this would be impossible was it not for the community

context. While many discussed the importance, no one was more poignant than Betty at

age 97:

The best thing here is the friends that I've made. I've made friends.

Wonderful people that I love and who love me, and (pause) I wasn't going

to have that sitting in my house. You know at night when I can't sleep I

like to count them. (laughter) Like counting sheep. Like, like I've got

about eight goodies (laughter) and then about 25-30 mediums, (laughter)

and then there is a bunch of people I can't stand.

Betty is not sugar coating reality by acknowledging that there are still people with whom

she does not get along. However, her ability to continue to develop deep caring and, as

she describes them, loving relationships at the age of 97 is awe inspiring. She also

recognizes that this would not have been possible if she were still living alone in her

previous home.

Barb emphasizes the possibilities for socialization and development of

friendships:

At this age living in your house (Penny: you wouldn't be making friends)

by yourself, you can't. Maybe somebody moved in across the street, and

you make an effort to get over and to introduce yourself, maybe you ask

them to come over for a drink later. But you don't make the number of

friends that we have here. And in the winter, you don't get out at all. So

that we know we wouldn't, and that's why we appreciate it even more in

the winter time. We realize, hey we're going to dinner with somebody,

we're going to class.

Barb credits being in the Village with keeping her socially engaged, especially in the

winter. In this quote, she nicely contrasts the potential for expanding a circle of friends

and socializing outside of the CCRC. Consistent with many of the perceptions of

participants, socializing too is just easier here in the Village.

Socializng at meal times and throughout the facility is seen as an important

strategy to avoid the temptation of isolating and brooding alone in the apartment.

Participants seem to recognize that the potential for depression is a real concern, and that

strategies, such as socializing; can be employed to help keep it at bay.

Educational challenges – preventing the wet noodle. Once the decision has been made to enter the Village, it almost assumed that everything about the program has an educational focus. By that I mean, that it was very difficult to separate the educational component from the CCRC component. Residents speak as if they are inextricable connected. One ideal that residents did speak of was the use of educational activities to keep active and challenged. The wet noodle analogy was raised by some participants; others spoke of their brains drying out without the stimulation of educational activity. This idea of the wet noodle describes general concerns about brain function. One can participate in cognitively stimulating activities, such as educational pursuits, to keep from losing or diluting intellectual abilities. One point that I found interesting as this preventing cognitive decline emphasis was discussed, was that none of the participants reported that they selected the Village and continuing education as a way to prevent cognitive decline.

> Joan suggests when asked what the purpose of education for her is:
>
> To stimulate you and keep you growing. Make you aware of the world
>
> around you. The world is moving so fast - if you don't do a little
>
> something you'll be - you're lost. You're left behind. To keep up - I mean,
>
> learning the computer. I would never have thought about it - cell phones -
>
> it's a whole new world.

Joan, like others, recognizes that education at this stage of her life is multi-purposed. On the one hand, it promotes growth and development. However, it also helps you stay connected and informed, as our global world gets more complicated. Technological

advances are a whole issue unto themselves. Since much of our technology has evolved

as forms of communication, if you cannot use a cell phone or a computer, you really are

out of touch.

Penny also sees keeping her mind active as way to combat the potential for

depression, but does not consider it preventative for cognitive decline:

Well I think we all feel that if we can keep our minds active we're ahead

of the game. You know, not sit and be depressed...not that I'm a

particularly...I'm not that kind of a person. But, you could sit and be

depressed. I think that going to classes lifts you up. I don't think it wards

off anything. If you're really... have, you know towards, in the dementia

area, I don't think it wards anything off. But it keeps you alert and alive

and thinking. Whereas, if you are not in that kind of a situation you...you

know, you might push yourself to go to a lecture or something. But if it's

here, and it's available, it's easy. That's the way I feel about it.

So Penny sees her educational engagement as keeping her 'alert and alive,' perhaps these

are more important than forestalling a dementia.

Olga, contradicting Penny slightly, gives the example of her husband to express

her belief that participation in education can and does support cognition as one ages:

…but this particular retirement community, because of the educational

connotations and things, is different from most of them. And they do try to

keep your brain functioning. Uh, my husband came here when he was

close to ninety years old, and he retired when he was in his eighties, and

he commuted on the train for one hour and fifteen minutes each way, from

Long Island to Wall Street. And, uh, his thinking almost stayed with him,

almost until he died, when he was ninety-five. So you see, you will have

some influence on your fate, by activity.

Olga is unwilling to give up her destiny to fate, and sees the educational program as one

way to promote her brain functioning.

With regard to questions about the role that the annual requirement for 450 hours

of continuing education plays in the community, Ted summarizes it in the following:

It's my sense that the requirement is not as important to people as the

philosophy. So the notion that there's 450 hours, that 450 there's no magic

to that. This has the advantage that you do have some companionship and

you have courses and you have concerts and you have things going on

without going very far out of your way. A lot of seniors become lethargic

and don't push anything like that, therefore if you're in a community

where it's being pushed, you are at an advantage.

The fact that the requirement exists, is seen more of as a shared commitment to the value

of completing 450 hours per year. Participants make it clear that it is not seen as a law

that gets enforced, after all "no one has ever gotten evicted over it."

Spiritual Development within this Community: Metamorphosis Begins

Focus group questions were not designed to explore personal philosophies, so it

was striking that so many issues were raised in this realm. Participants routinely

discussed issues of death and dying and considered how the context of the Village

contributed to their own sense of being. At times, this was touched off by practical comments, for example, about downsizing and making the observation that material possessions have less meaning at this stage of life. At other times the discussion was fueled by an apparent concentration of deaths in the community (about six in five months) – that had impacted participants and challenged the integrity of the community. Regardless of how or why the issues were raised, these residents are actively exploring their spirituality within the Village setting. It seems that the educational pursuits within the Village context are not confined solely to the intellectual realm.

This spiritual perspective at times is described in terms of enhanced introspection as in this quote by Olive:

But my, you were talking about being self sufficient and I think we each

are ultimately responsible for our own lives. But I think that, I know when

I have connections with people, and some are casual and some are deeper.

Those are also part of what keeps me balanced and comfortable with life.

Olive grapples with coming to terms with her interdependence with others. She has considered the varying degrees of relationships in her life, and the impact of these on her life satisfaction. She makes an important distinction that this appreciation that she has gained is inconsistent with ideals of independence often emphasized in our society.

Penny continues the exploration of the role that relationships with peers, and potentially intergenerational experiences, can play in her life:

There is a sense, a big sense of camaraderie, and uh I'm trying to put it

into words, uh, I have not taken a course at the college, because up till

now I've been away a lot. But, I do want to take a course at the college.

And I think it's wonderful to be with young people...but I don't think it's

the be all and the end all. I think you have to get your own philosophy of

what life, what the rest of your life is going to be like. You're either going

to make something nice about it, or be down.

Penny seems a bit more mixed than Olive, valuing relationships, but not forfeiting her

autonomy in the process (perhaps no surprise she hailed from 'Live free or die' New

Hampshire). It is interesting that she does not rely on her skills, or her experience. She

has instead come to rely on her personal philosophy to see her through this final stage of

life.

Coping with losses. As noted above, the Village had recently experienced

multiple deaths in a relatively short period of time. This was difficult for many of the

participants to experience. Alice comments about her challenge facing the loss of many

close friends in the facility:

A lot of us have died. An awful lot of us have died. …the first five years

or so, it was not such a big deal. You think age might be the reason? I

think it's, it's very hard to take, because it's almost a weekly affair. And

particularly hard for me. Because so many of my original, good friends.

It's very hard. Well it's bound to be in any retirement community where

the ages go up to the high nineties; you're going to have that. Even a few

of the people who died recently, were up and doing just a few weeks

before. You know it's encouraging to see that it can be done.

Alice seems a bit ambivalent as she struggles to cope with her sense of loss and the fact that she is being confronted, 'almost weekly,' with her own mortality as well. At 91 years old, she is aware that it is her challenge to "survive" the many losses she is experiencing. She expresses being confronted by her own mortality in her choice of the word us, 'a lot of us have died.' She is able to glean some hope and optimism out of the experience in noting the relative health of her deceased friends, just prior to death.

Participants were acutely aware of the fact that they are being confronted with death and dying in this age-segregated community more than, if they lived outside. As Doug suggests, "it's more concentrated and intense because we are all right here and we know and care about each other." Betty concurs with Doug's assertion, "But sitting there that death thing is sitting in this place. It's, it's part of our lives here. We don't have that in our house in the suburbs." The realities of aging and mortality are faced everyday in this community of elders.

Death and dying is alive and well in this community, yet participants noted that there is no formal mechanism for coping. In an effort to address this, Ted recounts a recent event he initiated:

So I called the people together and we met in our apartment. And, we spent about two hours just talking about [Sally], and how we felt about her. You know, what her leaving, her dying meant to us. I think it helped a lot. They tell me, the residents tell me it helped a lot. I think, I'm not saying that that's a model for the place, but I think that something has to

be put in place that recognizes that people died and how we can feel and

react about that.

The absence of formal rituals and established processes for mourning was seen as a void in this caring community. There were multiple examples of informal, resident initiated 'memorial services' that took place, always with a concern that these were not sanctioned by administration. Apparently, the informal mourning was not discouraged by administration either.

In the next passage, Olive speaks eloquently about her process of accepting and coping with the realities of her own death:

I remember at the time in my life when I was very afraid of getting old and

being by myself, and losing my mind, and my body failed and I was in

pain. Now here I am all by myself, and now I'm going to die and that's

going to be awful. And, I worried about that a lot. And, then I realized that

I am ruining today with all this fear that I have. And I have been able to let

go of all of that. Death is no longer, I know I'm going to die. You know it's

going to happen when it happens…but I wasted a lot of my life worrying

about something that was a waste of time.

Scott: But does the community here, does being part of this community,

do you think that is an antidote for some of it. Or had you already resolved

it?

Olive: Yeah, I think so. I had resolved some of it, but coming here...you

know, I had had a neighbor who died over the period of a few weeks. And

> I was going in to see her at night. She was just, she was at peace with it.
>
> And then I have another somebody in the building, who was upstairs and
>
> died upstairs, and rather quickly, but. You know it's, it's a, I know it's
>
> going to happen, but I don't know when or where and I'm not going to
>
> worry about it anymore. Who knows? But I think I've gotten a lot more,
>
> it's not anything...cause I think our society says that we all have to look
>
> like we're perfect. And able to do everything and are in charge. And the
>
> truth of the matter is (Penny: We're not) sometimes we are, and sometimes
>
> we're not.

It seems clear from this passage that Olive has taken advantage of the opportunities within the community to learn about the process of death and dying. Rather than being frightened into isolation, she has engaged with community through their dying in preparation for her own. So, even though facing death in the age-segregated setting is difficult, many described it as just another one of the challenges or opportunities in the community to learn and grow.

In the next passage, Lina describes the process that she has gone through to come to terms with death, seemingly in an effort to support her fellow group member, Betty:

> Lina: …I suffered the loss of some really precious people as we all have,
>
> one of them very young. I know what it feels like. I think about it a lot. At
>
> the same time, I know I'm getting older and I want to do what I can do and
>
> enjoy and hear and see and go. I mean that's the other side of it. And since

I do have limited time, let me do it while I can still do it. This is, this is how I feel.

Trish: And enjoy it. If you look at it in a certain way, it's almost an obligation. I mean we've had this opportunity to enjoy what is around us. What a waste if we don't.

Lina: And there's almost a …while I hear a quartet which I may have heard half a dozen times before; I can hear it in my head. Then I hear a live performance of the music, and suddenly I love it even more. It's especially wonderful that I got to go. I mean that's the place that I find myself in. Yeah, it has even more meaning to me. Otherwise you can, [Betty] there are many things that you can do that I know you enjoy.

Betty: Yes, and.

Lina: So isn't that a comfort to you? And a relief from the darker, darker feeling?

Betty: Well, of course. People are complicated. I'm not just going around brooding about dying. I've got eight things going!

This exchange captures the process exquisitely. Participants discussed and shared concerns about death, and offered support to one another, but it was not morbid or morose. There still are about eight other things going on too. This community provides a forum to explore feelings and ideas about death without becoming overly immersed in the topic; because there are many other topics and activities in which to engage.

Turning inward to review and strengthen convictions. In addition to explorations of death and dying, participants described a transformation in their personal ideals. What they believe and value seems to be fortified by the Village experience. Betty is quite emphatic and clear in this regard:

> I feel stronger about things than I used to. I felt stronger about things now (pause) I'm really strong like ready to take on the world. And, it's living here seems to fortify that. I'll get into an, an argument, and argue my point. I used to have those points before, but they weren't such a big deal as now. They're enormous. And my politics is almost getting stronger than ever. It was always strong, but stronger than ever. And also my view, my views on almost anything coming on strong and that's living here. I don't know if sitting alone in my apartment is making it happen. I don't get it. (laughter) How does it happen? May be the friends that I have made.
>
> Doug: [Betty] is an evangelical atheist. (laughter)
>
> Betty: But, but it is true that I got stronger on that. I didn't care that much about that. And when I lived in a neighborhood, you aren't going to talk to your neighbors about that. They are all going to their religion. But here, it was such a focus on it that, that it really you know scared me and so that's one.

Even though she may not understand how or why it has happened, Betty is clear about the strengthening of her convictions. She is also quite clear that she attributes the reason for this reinforcement of her beliefs to something that has happened in the Village

community. It is different here than at home, she could not have these arguments with her neighbors. The support and acceptance she enjoys within the community is different and enriching.

Unselfish caring and giving to others. The last spiritual theme that resonated across groups had to do with what appears to be a community philosophy that values caring for others. Lina describes the potentials for giving care:

Yeah. You were talking about relationships here and caring. I think part of that is that people who have decided to come here, for whatever reasons in their pasts, realize they are not the center of the universe, and therefore they are not out for themselves alone. We all like to be useful (pause) and helping other people is a way of being useful. Not for selfish reasons, but of course that opportunity is here to. So, there is an interaction here, and for anybody in any stage of life to be part of something is very important. It helps your own self image.

Participants described similar senses that they are part of something greater than themselves. Perhaps the community is greater than the sum of its parts. Essential to this is exchange of care and kindnesses within the community.

Ted initiates the following exchange that captures the notion that there is community philosophy of caring:

Ted: So we may have a spiritual dimension right here among us. That sort of is built in by the educational part of it. But not learning the facts of education. But the way we adhere to it; the way we believe in it; we share

that. We care for and about the people in the community here. I mean, our caring about them leads to our caring for them. So if I help [Barb] get her walker over, it's because I care about [Barb]. (Many affirm) I think that's a different dimension, and that's being built here, in this community.

Penny: I think that living here, you have an opportunity to do the things that you can do - this may sound like Polly Anna - to help people in small ways. That you, it's very gratifying to me to be able to help people. Not in big ways, but little ways.

Olive: But don't you also, when you are able to help somebody, and they appreciate it - you sort of get this reward.

Penny: That's what I'm saying, that's what I'm saying. I mean, you know, I did volunteer work and help people. But it isn't the same. It isn't the same. When you're doing something in a hospital, or whatever situation you find yourself in. But it's a much more personal thing here. I'm not expressing it well.

Barb: The way things are, if I couldn't get the, I could even say, would you get the walker over there for me? I'm having a little problem. And I wouldn't feel, I wouldn't hesitate to ask. Knowing that, what the response was going to be. The people are like that here.

Penny: It's a very warm place to live, really.

The relationships within this community afford residents the opportunity to feel productive in a personal way. This is not the same as holding a volunteer position; this is

personal. The meaning and appreciation shared in the transaction seem to fuel and perpetuate caring around the community.

Conclusion

Participants in this study have provided rich descriptions of many aspects of living and learning in the unique CCRC and educational program. Participants came to Lasell Village from a variety of places for a variety reasons, however, there are many commonalities that set the stage for connections between residents. The educational program is valued for providing structure and fostering both physical and cognitive activity for participants. Participants' interests in and values of educational pursuits are not seen as new, most described they would seek similar activities if living elsewhere, but the Village affords an ease of access to activities that would be difficult to replicate outside of this facility. This is a caring and compassionate community that provides support and security for even the frailest residents. Respondents conveyed a clear benefit to socialization within the setting, especially around the dining room and classroom experiences. Overall, participants were very positive in their attitudes towards the living and learning possibilities in this context.

CHAPTER FIVE

Intergenerational Possibilities and Realities

The potential for intergenerational interaction seems integral to the concept of a continuing care retirement community on a college campus. In this setting, residents have the opportunity to take classes on campus with college-aged students, or remain within the Village setting to participate in classes. Some college classes are identified as being intergenerational in nature, with specific assignments to foster interactions across generational lines. In other cases a Village resident may seek admission into any class of interest available in the college catalog. Village classes are available to elder residents only, and can be enrolled in through a lottery system. The Village academic year coincides with the college's calendar, offering classes in fall, spring and summer sessions. Village classes are generally taught by fellow residents with a particular area of expertise or interest. In addition to semester long classes, the Village offers residents workshops, lectures and cultural events (often concerts) on a regular basis. This entire system of education for the Village residents is scheduled, overseen and coordinated by the Dean of the Village's office.

The focus of this Chapter is to share the perceptions of the participants specifically related to these intergenerational programs available at Lasell Village. As noted in Chapter Three, the sample included two focus groups with participants who take mostly college based classes (intergenerational) and four focus groups with participants who participated mostly in Village based classes (segregated). Participants self identified their classification into these groups. In spite of an anticipated differentiation of the

findings based on these groupings, the analysis of these data did not reflect that the content of the specific groups was markedly different. The one distinction that is noted is that there was a higher concentration of men (44%) in the intergenerational groups, as opposed to (18%) in the age-segregated sessions. As such, the data were analyzed as a whole, with the unit of analysis the individual member's perceptions. This decision is supported by the important differences amongst individual member's reports which will be the focus of this discussion. Specific themes generated in this analysis include: 1) barriers to intergenerational engagements at the Village; 2) perceived benefits from intergenerational experiences; and, 3) potential opportunities for building more generational bridges with the college campus.

Barriers to Intergenerational Engagement

Regardless of which participant you ask, there is a universal sense that the intergenerational connection between Lasell College and Lasell Village could be strengthened. What is not so universal are respondents' reasons why the connection is weak. This section will organize some of the issues that participants raised which interfere with intergenerational engagement on campus. Marketing information, coupled with the concept of the placement of the CCRC on a college campus, suggests a close relationship that may not really exist. Participants identify that there are administrative, logistical, and motivational reasons why this interconnectedness may be minimal.

Administrative barriers to intergenerational participation. What is very clear from our conversations is that intergenerational connections take work. Many residents conveyed that they expected that the facility could do more to foster these connections.

Lois seems to suggest that administrative inattention to the intergenerational component

dates back to its inception:

> This place was developed because the past president understood, wanted
>
> money to save the college. So, it wasn't started to do the intergenerational
>
> stuff so much ...Which is alright, I'm not saying it was wrong. He had a
>
> brilliant idea and it was - it's been successful.

Perhaps it has been successful at saving the college, but for many participants not so

successful at fostering intergenerational contacts. In fact, many participants were quick to

point out that the college administration initially had no intention of including an

educational component, let alone an intergenerational perspective. The inclusion of an

educational requirement, and thus the intergenerational opportunities at the Village were

initiated to pass restricted land use zoning hurdles. Betty challenges others in her group,

"But intergenerational, let's face it, it's a flop. We have to be honest. It's not something

that's happening. We're here at Lasell College. We have Lasell College here. What do

you have to do with Lasell College? I bet zero." Most conceded that their connection with

the college was minimal.

Olga goes on to confirm her perception that the connection is minimal and

suggests that it has not received enough support to fully develop:

> There's not very much interaction, in my, in my opinion. Uh, we, actually,
>
> there could be more than there is, because it's not being nurtured, okay? I
>
> think that we see very little of the students, and we have really, very little
>
> to do with them. Okay, there are a few people; maybe, you can count them

on one hand, who take courses with the students. But we, the rest of us,

take courses and classes and seminars just with the seniors. So, I think

there's separation of stage, or whatever you wanna call it.

Olga's suggestion that more interconnections could be possible if the relationship were

nurtured more seems a direct indictment of the administration. As a word of caution, this

may be a sharp oversimplification of the issues. It becomes clear throughout this analysis

that there is interplay of multiple factors that limit intergenerational engagement. The

lack of administrative support is but one consideration.

Logistical barriers to intergenerational participation. In contrast to the benefits

of easy living at the Village as described in Chapter Four, taking classes at the college

presents a number of additional challenges for participants. The first hurdle to be raised is

the transportation issue to get to the college. While all the buildings are interconnected by

walkways, the college is not easily accessible. Participants need to schedule a van to pick

them up and drop them off at class. This adds time to the commitment for taking the

class; one participant referred to this added time as 'commuting time.' The van needs to

be arranged about a half hour earlier than needed, in case it is running late, adding as

much as an hour to a ten minute roundtrip. One alternative to dealing with the van hassles

includes driving your own car (assuming the resident still drives), and dealing with a lack

of adequate parking. Another alternative could be walking outside; however, the area is

quite hilly and one would be directly exposed to any inclement weather that might occur.

Suffice it to say that as close as they are in proximity to the college, most participants still

experience it as inaccessible.

Joyce also factors the weather into her concerns and reasoning for not yet taking a class at the college, "But I have not taken classes. Um, coming from Florida to here, I kept thinkin', 'In the winter, do I wanna go out in the snow and ice?' It's easier to stay in the building, although they do give you transportation. But just the idea, it just…" The concern about potentially falling on the ice is very real and present in our discussion, even though the focus groups happened in 80+ degree weather in August. Therefore, I would argue that these concerns cannot be overstated.

The last logistical concern that was raised by many is the added time involved with taking college based classes. The time involved, as described here by Harry, includes transit and preparation time, in addition to the added classroom time:

> It's not easy taking classes, it's not easy. For example I've signed up for two classes now that will be ready in September. And, both of them are twice a week for an hour and a half and it doesn't work out to be an hour and a half, because it takes you at least 15 minutes to get there and 15 minutes to get back. And it's another hour that is cutting into your life in addition to the one and a half. So that's for two days, Monday and Wednesday and then the other one is for Tuesday and Thursday. So that means you've got four days that you're busy with that. Then you've got reading to do. It's never less than maybe 2 1/2 to 3 hours to read. So you're occupied...you're very busy. And it's not easy, because they're difficult subjects.

Joan echoes Harry's sentiments about added time demands, while adding the idea that the scheduling also may compete with Village based activities:

> One of the problems with it is that those courses are usually given either
>
> two or three days a week. Whereas, the courses that we take right here in
>
> the community are one day a week. So, you're choices work out
>
> differently. If you have to go to class three days a week, that really limits
>
> what you do with your other courses.

Penny admits that time concerns have limited her pursuit of intergenerational classes, "I haven't so far because of the time element." Whether one accepts the idea that the added time is worth it or not, it clearly represents a major factor that contributes to decisions about participating in college based classes.

Kathy summarizes the logistical concerns that interfere with residents taking intergenerational classes as follows. "It's a lot more demanding to take a college course. It meets two or three times a week and a lot more reading. And you have to participate. You don't audit. You participate. You have to write reports and do everything except getting grades." Given the magnitude of logistical concerns it may be surprising to realize that most participants (approximately 70%) across groups reported some formal exposure to an intergenerational learning experience. Of the approximate 30% of participants not reporting formal intergenerational experiences, more than half described planning, or hoping, to do so in the future. Thus, in spite of the barriers described, participants appear to value the potential for intergenerational exchange and express motivation to make it happen.

Motivation factors that interfere with intergenerational experience. The first

factor to consider with regard to motivation for intergenerational participation is that, as

the saying goes, 'It takes two to tango.' Most of the Village residents selected the setting

because it was on a college campus. While this was not studied, most participants agreed

that it is highly unlikely if many (or any) students selected Lasell College because of its

proximity to a CCRC. The participants point out then that if intergenerational

connections are going to happen, it is unrealistic to expect that they will be initiated by

the college students. The burden for establishing and maintaining intergenerational

connections falls on the Village residents and administration.

Betty gives a first hand example of how she was disappointed when trying to

include college students in a political organization and protest with Village residents:

No, but we have tried to have inter, what's the word here, (Scott:

intergenerational), intergenerational and we have failed. I have tried,

because I am part of that Peace Network that, we tried to get the kids to be

involved with us. Wow! They never came to any of our meetings, not one

kid. And then we went on a march and the, we really collected I think five,

five students who were going to help us because we were old and it was

tough for us. What a flop that was. Of that five people, two showed, all

into their own little thing of them having a good time, they didn't help us

worth shucks, and that was a failure.

While she does not directly attribute it to differing motivations, the students clearly did

not have the same level of investment in the event as Betty. It is also not clear that it was

made explicit to the students that their help was needed by the elders. It might be simpler to attribute this to communication difficulties across generations – but I think that mismatched motivation seems to better describe this and other situations that participants expressed. Eliza seems to agree that this motivation gap is often manifested in communication issues, "I think that, historic or educational, there's a great difference between my generation and those young people. And it's not always easy to communicate well with them." In these examples, varying degrees of motivation and priorities between the generations certainly complicate intergenerational connections.

Meg puts this generational gap in practical terms as she speculates why students may not make the effort to make intergenerational connections:

> I'm not sure that the college students particularly are interested in Lasell Village, and the people that are here. They all have grandmothers, they don't need more grandmothers….I don't think college students need to have any more adults pushing them around. That's what they are trying to get away from. You know the people who tell them what to do, and, therefore I think that uh, it's not a system which works together.

Meg describes the residents in parental roles, which may well be antithetical to the interests of traditional-aged, residential college students. Since the students were not asked directly, it is important to note that what is being addressed here is the elder residents' perceptions of why the college students may lack motivation to engage in intergenerational experiences.

Residents too may lack the necessary motivation to maximize intergenerational connections. Participants again addressed some of their concerns about the gap between themselves and the college students in somewhat elitist terms. In general, most participants question the caliber of the students at Lasell College, although most also agreed that the college has raised its standards in the last five years. Olga was particularly clear in the following excerpt describing the disconnect between students and residents, in addition to teaching those of us present a new vocabulary word:

> There's something else…there is a tremendous difference in level of education between the students who are here in this particular institute, institution and the people who are living here. The people who are living here came here because they were looking for more and more education because that's what they've been doing all their lives. The students at Lasell are not of that same caliber, by and large – there are always exceptions. Isn't that correct? Well I think it is not so illogical, because of the *niveau* of the two different schools, of the two different groups are very different. I think that there are a few people who love it and like to be with young people and for that reason come to it. But most of us take it with the adults and not with the young ones. …It's like a ladder, okay? You have a – your highly educated, your middle educated and your less educated. That's *niveau* – it's a French word.

Evocative of social class divisions, participants view themselves as better than the student populace at Lasell College and, therefore, are uninterested in relating to them. If this was

merely an example of a generation gap, perhaps residents would they feel they cannot relate to the younger generation. However, based on our discussions, I would suggest that it is more a perception that students, because of their lack of academic status, do not have much to offer residents.

This quote from Lois supports Olga's idea using firsthand experience with students in class to affirm her conviction:

My perception of the college is that it's maybe second rate - third rate, I'm not sure. It didn't interest me particularly, what they were doing. I did take a class with some of the students, and I didn't find it very stimulating from their point of view. I mean from the work I got from them. I just prefer to have it here, it's just more convenient.

Lois' interactions with the students were not stimulating enough to be worth the necessary effort. Since the students are perceived as sub par, many of the participants are unwilling to extend the effort that would be necessary to establish ongoing intergenerational connections with the college.

The potential motivational barriers to intergenerational engagements rest within the realm of both students and residents. As it stands now there is unequal responsibility for the initiation and maintenance of such relationships on the elder residents. It is clear that they do not uniformly value or perceive benefits from such engagements. As Natalie suggests, "Yeah, I haven't needed to. I haven't felt the attraction particularly. It would be a wonderful experience; I'd like to try it sometime. I know there are not too many people that do it here." While she retains the possibility of trying it 'sometime,' she is not

compelled by any need to go out of her comfort zone to make it happen. As with most participants she is satisfied with her educational engagements at the Village and sees no need to rock the boat.

Benefits of Intergenerational Engagement

It should be noted that all participants acknowledged some intergenerational exposure. For some (approximately 70%) this included taking formal classes at the college. Others may have participated with students in various assignments, such as an interview with them at the Village. All related that there were informal contacts that occurred from interacting with the wait staff (work study students) in the dining room to seeing groups of students walking by on the way to public transportation. As such, the findings in this section are compiled from analyses of all six focus group interviews. The descriptive quotes are representative of perceptions shared across groups.

Societal benefits of intergenerational connections. In spite of the reported difficulties and obstacles related to making connections with the college students, there is still a cadre of Lasell Village residents who routinely engage with college students. Ted describes his sense that without the intergenerational connection, he would be completely disconnected from this generation of young people:

> I think that the other thing is, the connection with young people is very
>
> important and is very much missed I think in our society. Before I came
>
> here and not, not taking my work because I had retired, but basically, the
>
> connection is broken. And you really don't understand, because the media
>
> doesn't help you. You don't understand what the young people are all

about, what they want, how you could help them. That's a remarkable

thing that we can get here. …It's very interesting first for them to hear us

and our points of view. And it's very interesting for us to know where they

are. Sometimes we wring our hands and cry (chuckle) but at other times

we realize that the relationship is important. We're really not just from

another generation, we really practically grandparents or great grand… I

can't say great grand parents…but ah so there's a jump of generations. It's

terribly important for us to happen to know where we're going today, and

for them to know where we were.

Ted's description does not dispute that there might be issues with *niveau* as he 'wrings

his hands and cries' at times. He also readily acknowledges that there are multiple

generational lines to be crossed. Yet he seems motivated to stay connected, both for

himself, but also, for the students and perhaps for society at large as well. One of the

codes used in the analysis was titled 'intergenerational reciprocity,' capturing that the

engagement might benefit the both individuals, while also serving a greater good.

Ted was particularly loquacious about his ideas on the virtues of intergenerational

engagements. He goes on in this next excerpt to discuss the individual benefits to his

sense of his aging, while challenging existing practices of age-segregation within our

society:

In the sense that we've become so separate in our sociology, the way we've

developed here. Children are with children, teenagers are with teenagers,

young adults are with young adults, we're again a separate group. And,

bridging I think helps our aging along, my aging process certainly,

because I feel that I'm part of the population dynamic, actually. I'm not

sort of over here, and, that's terribly important, because it's some way to

bring us together. I think we remain, I think we do remain younger here. I

think my friends here would agree with that. I think we'll remain younger

here because we are part of that dynamic. And we are not old folks in a,

even a council for the aging for example. And so we are not all so

separated, as the rest of the people. I think the young people feel the same

way. God, here are old people. You know, we are hungry to know what

it's like to be part of that part of life. That also helps us feel that there is

meaning in our lives, because we are important to them.

Ted's unwillingness to be shoved aside by social expectations seems to be a very

empowering process for him, to the extent that he sees himself as a bit of a rebel stating,

"But we are defying society. We are saying: We're alive; we're going to be healthy; we're

going to contribute; and we're going to interact when we can with the younger generation.

This is a very revolutionary concept."

Benefits to elders who engage in intergenerational programs. Participants

described a variety of personal benefits to engaging across generational lines. Above, Ted

alludes to the idea that engaging with the students helps keep him young by connecting

him to the 'population dynamic.' Harry sees the personal benefits to taking college

classes with the traditional-aged students on a bit more practical level:

We're keeping our brain busy. We're doing a lot of reading. And being

with the young people you get all kinds of different throw backs at you,

because they ask you all kinds of questions. And it happens that way, and

you feel sometimes, I know in the so many years that I've been here that I

have affected a lot of people, kids mostly, who have come here asking

questions in groups, because they want more information, and the teachers

set that kind of stuff up, and they come here.

What is dynamic for Harry is less about the population at large, and more about the direct interaction that he has with the students. Harry describes the questioning of the younger students, as if it helps keep him on his toes. One important distinction here is that intergenerational classes keep his 'brain busy,' since you never know what they are going to throw at you. Harry experiences the interactions with college-aged students as more dynamic and perhaps challenging than with his peers. This added challenge may hold the key to maximizing the benefits to his cognition.

Adam applies a similar benefit, to a different intergenerational experience that he has had with elementary-aged students:

What I find interesting is that there is a program over here that the public

schools can set up their kids coming here and we can answer their

questions etc. Generally there is a book that they're reading in the fifth or

sixth grades and the residents read the book and then the students come in

and they go over the book together. And we feel that what we're getting is

that we have to do the reading and be prepared for anything. These kids

today are so bright, you really have to be on point with them.

Adam does not directly link this experience to the benefits of cognitive stimulation, but it

is clearly implied. Thus, engaging in the exchange of information across generations may

be more dynamic than within generational exchanges. Further, residents reap the benefit

of more challenging interactions that involve more cognitive stimulation.

Ida experiences direct assistance from her fellow art class students in this

example:

I've had to push myself in some, and sweat through some art courses,

'cause I've never had one—I, when I went to school, there was no

teaching art in kindergarten that you took home and mommy put on the

refrigerator. That—Nobody ever heard of that. It's just, you didn't do it,

you know. And so, but they—And I learned a lot from the students and

because they were so used to this, and they, they could see I was

struggling, so they, they were kind to the old lady. But, but I learned a lot

from that because you learn from adversity.

Mike was similarly bolstered by his fellow students when he found himself ill prepared

for a film class:

And here again, the students in the class were so far ahead of me, I

thought I was doing something about putting together a documentary.

And, taking, using a camera and then using software. They were so far

ahead I found it interesting. I did learn something. The most that I did

learn was that I was completely unprepared for filming in that course.

In both of these examples the participants equated their lack of ability or knowledge to

generational factors. Ida had never been exposed to an art class, and Mike was unfamiliar

with the workings of the technology necessary for the film class. The real support of

fellow students, who were more familiar with the course content based on their

generational exposure, is not necessarily such a unique occurrence in a class. The

importance of this is magnified by the *niveau*. The Village residents consider themselves

older and wiser, and yet these non-Ivy league young people taught them things.

Meg captures something from experiencing a student assignment in Middle

Eastern History class she took:

There was a discussion about the Crusades, and one of the students in the

class was a young man from Kuwait – a Muslim. So he gave the, his oral

report based on the Turkish point of view of the Crusades, and our fellow

resident gave it from the, uh, western point of view. Fascinating! The rest

of our discussions, the rest of our reports were quite inferior compared to

that, it was really very special. Interesting young man, this student.

While perhaps not being directly supported by her fellow student in this example it is

clear that her learning was enriched by having him present and experiencing his

perspectives of the material in the class.

Kathy seems to have received a less tangible sense of support, through an internet

exchange with students around course material:

> I had one experience though. I took one class at the college and during the
>
> college, I mean during the class time, I think I did more of the talking than
>
> anybody else. But the professor …asked questions on the internet and we
>
> were supposed to respond to them. And the students, the Lasell students,
>
> were very verbal on the internet and one guy who we had a sort of going
>
> back and forth online, and when I came to class the next day and he said
>
> "hey dude" so I felt that I had made it. And we've become friends. Some
>
> of them we invite them down for dinner and what have you.

It is not hard to see that, for Kathy, this sense of being accepted by the traditional-aged

student was a powerful experience. So much so, that the relationship extended out

beyond the classroom. She clearly 'had made it.'

Similarly, Irene relates many examples of how her classroom interactions with

traditional-aged students extended beyond the confines of the class:

> We had a student who wrote to us, a year after we had been in a class with
>
> him, and suggested a book that he was reading and thought we might
>
> enjoy. And then, well, some guy came up to me the other day, not so long
>
> ago, just before the end of the session, and grabbed me, gave me a big
>
> hug. And I—big guy—Who is this? And he said, "Oh, am I glad to see
>
> you!" And I realized he must have been in one of the classes, and I
>
> remembered that he had been. But there are, there are, in the eight years
>
> there have been a variety of experiences.

Lina describes the impact of one particular student she encountered

Women in Art, both as subjects of art and artist. Long, I mean going back

to the convents and the arts of embroidery, rug making, weaving and on.

But the instructor, there were about 11 of us. I was the only person older.

First she asked why they were taking the course and then they most of

them were fashion design and it was a requirement. There were two guys

in the class. I've forgotten what one of them said. The other said "I know

nothing about art and I know even less about women (laughter) and I

figured that (laughter) in this course I could learn." I just loved it. You've

got to know that he was a young, black man. He was so conscientious

about doing the reading. I'll tell you the others just sat there in art class.

You know you have two views of the slides going, the lights are out and

everyone's doing their text messaging (laughter) but he paid attention and

he had opinions and he really so I engaged with him in a chat at break you

know and it was twice a week. So that was kind of fun to have that

experience. But I guess in my life in the community life, I sort of had a

continuing relationship with younger people in one way or another so it

was not exceptional. But that I, I just will never forget that his approach to

learning. You don't know anything about either one

Participants benefit from the sense of camaraderie with young students as well as direct

learning from them. Lina's take home message is that she will never forget the lesson oh

how this young man approached learning. Other benefits to elders include opportunities

for cognitive stimulation, activity, socialization, feeling like they are contributing to the

education of the students, and, keeping up with the times. Learning from these
'youngsters' helps keep the older generation hip.

Benefits to traditional-aged college students (as reported by elders). Olive
describes an experience in which she became aware that the elder participants in class
made a distinct contribution to the students:

> I was in one course with four people from the Village. There was an
> economist, and I'm an engineer, and a couple of other and social worker.
> And we're all kind of world wise and worn out and through the mill, you
> know. And, these kids are just full of enthusiasm and energy, which none
> of us have. But the interchange is so, so positive because - you know -
> they're getting honest opinions from the Villagers, because we have no
> axes to grind anymore - you know. And the kids really - and they ask
> questions. It's so wonderful being part of that. And I've had the experience
> of teaching in college, but the teacher doesn't have that relationship as you
> have when you're a fellow student - and that is very important.

The role distinction that Olive makes is important, noting that the elders can make a
different impact on the students because they are not in the formal teaching role. As a
result, students may be less threatened to ask questions or seek support since there is not
need to fear evaluative reprisal – after all the elders have 'no axes to grind.'

Reciprocity – shared benefits between students and elders. As previously noted
reciprocity is an important theme in the analysis of these findings. Harry describes the
process:

> And so we go back and forth and we talk to them. So there's reciprocity in
> it too. There certainly is, because they want to know what happened in,
> especially in history. And you have that background so that you can
> inform them, because you went through it. Your presidents, your politics,
> whatever it is. And they come here, and they continue to come here. I feel
> valued for my experience and the students gain a better understanding.

This idea of reciprocity in Harry's example involves the give and take of the exchange. The student benefits from the shared knowledge and described experiences of the elder. The elder feels valued for the contribution of their perspective. Feeling valued by the younger generation is in sharp contrast to Ted's concerns about being set by the wayside because of age. The more this notion gets challenged, the more likely it will change.

In contrast to Harry, Doug recognizes the unrealized potential for reciprocity with the student experiences he has had:

> There isn't much integration. The wait staff, waiters and waitress are the
> main source. Sometimes we, I have taken a few courses at the college and
> quite a few people have, and it's always been fun to take classes with
> young people the age of my grandchildren. (Kathy: And to see how out-
> of-step we are.) Well, I find I can learn from them and they can learn from
> me and it works out. But there's not much, not a lot of give-and-take.

Doug's perspective is almost diametrically opposed to that of Harry and Ted. It would appear that reciprocity for some is an unrealized potential of the setting and the relationships with college-aged students.

Informal intergenerational encounters. Participants perceived benefits to intergenerational exposures that might occur with less intensity than taking a class at the college. This finding was present in all transcripts across focus groups. Central to this finding, participants valued the ability to interact and form relationships with the wait staff in the dining room. Additionally, many of the wait staff members were students at an ESL program that was moving off campus. Every group mentioned this fact and lamented the loss of this opportunity. Many residents were very distressed that the ESL program was moving off campus and that the foreign students who served as wait staff would be unavailable. Residents see this interaction as a social opportunity for reciprocity. Meg gives us a sense of the importance of the experience to her:

> We also have relations— a somewhat friendly relationship with the
>
> waiters and waitresses, most of whom are college students. Particularly the
>
> Foreign Language Institute students, but we're losing them, because
>
> they're leaving the college. They had been renting a facility, a building
>
> here, which the college now needs because they're growing. So we're
>
> going to miss those, those students. Well, many of them could not speak
>
> very much English when they were first hired, and when, I remember at
>
> dinner the other night, when someone… One of the waiters who had come
>
> from, recently, from Korea, asked, 'Well, sir, would you like this?', and
>
> we said, 'No, madam.' And he said, 'Oh, thank you, thank you.' And he…
>
> So that every day that they served us, they learned more English.

Joan agrees with Meg's observations:

> And, I was going to say - the youngsters from the college who work in the dining room as our waiters and waitresses. They have learned from us and we from them. We've learned to appreciate their personalities and attitudes towards life. And they've learned to appreciate us. So it's been a two way street - it's been a wonderful experience.

The value of this relationship with the wait staff, and the sense of reciprocity it engendered, was a universal finding. Somehow here in the dining room, the generations come together for mutual benefit.

Informal opportunities for intergenerational experiences were described I addition to the dining room. Here Bonnie emphasizes the value of simple contacts:

> Okay, it's interesting, you asked about intergenerational opportunities, and I was thinking primarily of taking courses up on the college. But actually, every day of our lives we have an intergenerational experience here. Because having the young people working in our dining room, and seeing them walk by our door every day...I think that is sort of not a formal intergenerational experience, but it very much adds to the appeal of this particular community. I think that that part is wonderful. I see more young people than I see old people. That's a good feeling; you really feel part of it.

Simple and informal intergenerational experiences help Bonnie to continue to feel part of the world, in spite of the fact that she does not take intergenerational classes.

Sam agrees that he does not have a lot of formal interaction with college, but he still feels a benefit from his ability to have even passive interactions:

There's not a deep relationship. But even looking out your window and

seeing the kids walking by in their crazy dress and I get a kick out of.

Where I lived before I never saw any young people. So it's a superficial

connection and there are deeper ones like when you take the classes. But I,

I just enjoy looking out. I think there's an advantage to it.

It becomes important for Sam and others to note that there is potential to have even more exposures to young people than in their previous community settings. The dynamic setting of the college campus, with the hustle and bustle of students, provides superficial contact across generations that are valued by these participants.

Potential for Building Generational Bridges

Participants in this study were, by and large, actively engaged both in the focus groups and the Lasell Village community. Thus, the suggestion that the intergenerational connection with the college could be improved, gave rise to brainstorming about what might work. These discussions brought up ideas about using the extra curricular opportunities like the choral group to promote engagement. In this next example, Olive is considering how to capitalize on the experience of affecting students beyond the classroom:

However, I think having other adults available, whether they're teachers,

and teachers can't cover all their students. Nevertheless, it's a resource, and

it might be an idea, that could be explored in some way. Well sort of a

mentoring, or participating …[in] the spiritual program. She [spiritual

director at college] was telling me about a grief group that she runs.

Maybe residents and students could participate in a combined group that

would help both groups.

Here, Olive is trying to capitalize on the value of reciprocity to consider interconnections

that would serve both generations. Certainly, the residents were clear that issues of

mourning, and, death and dying are central to their experience. It seems a natural fit that

elders might come together with students around this topic.

When considering what could improve connections with the campus, some

participants mentioned programs that had previously worked to consider resuming. Joan

recounts one such practice that she found beneficial:

When this program first opened, they assigned a student to you, if you

were interested in learning about the computer. So it was a one on one

experience with that student. You met with that student once a week for

several months. And she gave you the basics of the computer. It was very

helpful.

This suggestion moves reciprocity in the other direction. Clearly, the younger generation

is for the most part more technologically sophisticated than many elders are. Capitalizing

first on the strengths of the younger generation to promote ongoing connections and

support around technology. I would argue that there is inherent in such a model, the

potential for developing connections that may come to transcend the computer focus.

Summary

Participants expressed concerns that there is very little intergenerational engagement on campus. However, they are not blind to its potential within this community. This chapter has reviewed the logistical barriers of time, weather conditions, transportation and workload that make it difficult for elders to participate readily in college classes in this setting. Elders also perceive a lack of interest in the college students to reach out to them in the Village. Discussion of *niveau* suggests that some level of elitism may complicate matters as well. This is compounded by a sense that the college and the Village administrations are not fully committed to enhancing intergenerational bonds. When successful connections are made, participants express feeling connected, alive, and valuable both within the interaction as well as potentially to society at large. It seems from these findings that the ideal of reciprocal relationships across generations and across campuses is a long way off. Given this, it is noteworthy that there is a sense of optimism and possibility that was conveyed through these transcripts that lead me to conclude that this is far from futile.

CHAPTER SIX

Conclusions

This chapter synthesizes the findings from Chapters Four and Five, and relates them to the current literature. I consider myself lucky for having the opportunity to enter the cocoon of Lasell Village and being able to explore the perceptions of the participants in this study. While their experiences may be personally meaningful to each participant, this chapter will focus on the general meanings that this new knowledge may generate.

Successful Aging at Lasell Village

The findings of this study strongly indicate that these participants are actively using the educational activities and support available at Lasell Village to promote successful aging. As noted previously, successful aging is a multifactorial concept (Baltes & Baltes, 1990; Bowling & Dieppe, 2005; Reker, 2002; Rowe & Kahn, 1997; Ryff & Keyes, 1995; Ryff et al., 2004; Tornstam, 1997, 2005) making it difficult to easily and definitively measure (Lawton, 1997; Ryff & Keyes, 1995). Evidence (such as this study's data) of the effectiveness of this higher education context to promote successful aging will likely fuel future demands for educational models and adult learning opportunities for elders in the U.S. (Manheimer, 2003, 2005, 2007).

First and foremost, the perceptions of this group of elders help us to understand and appreciate the rich opportunities for successful aging at a program such as Lasell Village. The care options and amenities make it possible for these individuals to focus on issues and activities that are more meaningful than the tasks associated with day-to-day survival. This shifting focus resonates directly with tenets of the theory of

gerotranscendence, as residents move away from traditionally mid-life values (Tornstam, 1989, 1997, 2005). Additionally, the presence of health services and classes (general, fitness, balance, etc.) serve to both minimize dysfunction (optimizing cognitive and physical health), and promote social engagement within the setting, meeting the definition of successful aging set forth by Rowe and Kahn (1997). The findings seem unequivocal that moving into the Village frees these participants psychologically and practically to engage in music, art, or other educational pursuits. This freedom suggests that residents have redefined the purpose of such educational pursuits. Consistent with Tornstam (1989, 1997, 2005), no longer are residents encumbered by the need to pursue activities to that feed their mid-life productivity. The meanings associated with their activity choices are more individually defined than reflective of more traditional social expectations. A number of participants point out that they make their educational plans and choose classes for *personal* enrichment. Often these are described as more aesthetic pursuits in philosophy (reading Plato), the arts (painting, music), or writing. As Betty marvels, "I became a writer at 92!" This is not simply a place for retrospection and contemplation, but rather, a place where elders engage and challenge themselves. Throughout the findings, there is a sense that participants have not given up, but rather redefined, what is important. Their activity choices and connections further expose the disengagement theory of aging as having little relevance to this group of participants (Dean & Newell, 1961; Tornstam, 1989, 2005).

The idea that there is safety and security within the Village context clearly sets the stage for all development and engagement here. These constructs resonate throughout the

discussions of most aspects of the program. There is a sense that in part participants are both reassured that many of their physical needs are addressed by the facility, and also, welcomed into a community of kindness and compassion. Participants feel safe in this context, and this safety permeates all aspects of their existence. Two aspects of this primal need for safety being met seem particularly relevant to this discussion. First, without basic safety needs being met there would be less opportunity for residents' growth and development. Second, participants reflect a sense that they were feeling unsafe prior to entering the Village. Thus, an enhanced sense of safety in the Village sets the stage for elders to evolve further.

Identity and self concept issues. It seems that activity within the Village is an important addition to the identity of participants, but it is no longer used for the primary purpose of defining their identity. When peers ask me (in my middle adult years) what I do, I often run off a litany of roles that I use to define myself socially: researcher; lecturer; PhD student; husband; father; son, etc. These roles are generally tailored to the particular context, with the list, or at least its sequence, varying depending on the circumstance. My self-presented identity fluctuates somewhat if meeting someone at a professional meeting versus at a church function. Participants in this study were not as wedded to using their activity patterns as definitions of their selves. They also rarely described themselves in terms of their past vocations. This seems to be evidence that residents are transcending the roles and standards of productivity of middle adulthood, and measuring their identity by more cosmic ideals (Tornstam, 1989, 1997, 2005).

Group identity is certainly dependent on the fact that, "we have a large number of Harvard graduates that are residents here, lots of psychiatrists and lawyers and college professors." However, this is not reflected in individual interactions. Throughout this project, as I was directly dealing with individuals, I had little sense if I was talking to a former stay-at-home mom or a retired college president. After the analyses, I have a better sense of these identities from compiling the demographic data and carefully reviewing the verbatim transcripts, but this aspect of identity was not present in my direct interactions with participants. This is in harmony with the descriptions of participants that they rely heavily on the self-selection of residents of the setting to establish a shared commonality, almost an egalitarian community. Perhaps in addition to shedding material possessions prior to entrance into the Village, residents also shed some of their mid-life standards to assume a common, peer status. Omoto and Aldrich (2007) described participants in their study as seeing the move into the retirement community as an opportunity to start anew. Similarly, some participants in this study referred to "opening a new chapter" of their life. This opportunity to start over may afford residents the opportunity to completely redefine themselves within the context of the CCRC community.

The microcosm of the continuing care retirement community within the microcosm of the college campus is particularly interesting to consider in light of the participants' exploration of the cocoon metaphor. The findings indicate that there is clearly a sense of relief that is experienced with entrance to Lasell Village. There is also very definitely a clear demarcation of aging before and after entering. This is reflective of

what Omoto and Aldrich (2007) described in their study as well, noting that many

residents of a retirement community described the decision to transition into the

community as a significant life event. Also consistent with Omoto and Aldrich (2007),

participants in the present study elaborately discussed the decision making process giving

little attention to actually moving into the Village. "Although the *decision* to move to a

retirement community was frequently mentioned as an important event in participants'

lives, the move itself was rarely mentioned" (Omoto & Aldrich, 2007, p. 291). This may

help to understand why participants consistently provided detailed recollections of their

decision to enter, and seemed to gloss over the actual move and physical transition into

Lasell Village. As long as elders enjoy the autonomy and personal causation needed to

render them capable of making such a major life decision, they readily accept the changes

and losses that such a decision may incur.

The finding that the self-selection of residents eases the transition for residents in

a college affiliated CCRC is a new contribution to the literature. Omoto and Aldrich

(2007) identified in their work that health problems and social isolation factored strongly

in the decision of elders to enter into a retirement community. The findings of this study

support their conclusion, but with the added wrinkle of a clear importance that the

commitment to continuing education contributed to the decision. This is evident in the

nearly universal finding that the educational program supported the decision to enter

Lasell Village. Some participants were primarily motivated by a pressing need for the

care and support (health and social) of the CCRC setting. They described the educational

program at Lasell as being a selling point of the program, prompting its selection over

other facilities. Others sought out the program solely because of the educational program, and simultaneously welcomed the relief that the care program afforded them. Regardless of the initial motivation, all agreed that the care and the educational program were significant benefits to them. Thus, decision-making was based on inextricably combined influences of the educational program, health care services, and social opportunities available at the Village.

While autonomy was necessary to execute the decision-making process, so too was it an influential motivator to seeking a CCRC setting. Participants in this study were both eloquent and emphatic in their descriptions of not wanting to burden family members with their declining health. In keeping with the findings of Omoto and Aldrich (2007), the importance of proximity to family without causing burden is clear. What was a bit surprising is that what is described as burden on family could be reconfigured in terms of avoiding personal dependence. As much as participants sought to protect family members from the demands of caring for future frailties, they also were driven to protect themselves from exposing vulnerabilities and inadequacies to their loved ones. It seems that the care opportunities in the CCRC serve the dual purpose of preventing family burden and allowing a level of sustained privacy and autonomy not otherwise afforded to many elders in the face of failing health.

Perhaps a bit more difficult to pin down is the importance that the aforementioned group identity seems to play in the dynamics of retirement community living. Feldman and Newcomb (1969) describe a process of self-selection and accentuation in describing the outcomes of college attendance in the development of traditional-aged college

students. These processes seem to capture many of the descriptions of participants as they recognize that there is a profound sense of sameness within the community. As Wanda suggested, it is a very "scrubbed" population. College students often experience similar realizations as they recognize their fit within the college community. 'Others (students or residents) selected the setting for similar reasons to me. Ergo, we are alike and I fit in,' which helps initially to facilitate the transition into the setting. Over time, this sameness 'rubs off' and gets more pronounced through a process of accentuation. There was very little, if any, significant conflict or disagreement within the focus groups, lending further credence to this concept. As participants readily pointed out, an alternative explanation might be that this study attracted the residents who readily engaged and actively participated in opportunities within the community. Therefore, there was an additional level of self-selection within the makeup of the focus groups that could be considered a limitation of the study.

The significance of the phenomenon of self-selection into the setting for these residents is a bit less clear than its presence. Perhaps noting that the population is rich with doctors and professors allows the residents (especially those who are not) to protect a sense of personal identity as being worthy to be counted amongst this esteemed group. Participants readily resisted the attempt to interpret this as an elitist phenomenon, so personal integrity seems a better match based on these findings. One interpretation is that the context of this setting, including its elite residents, supports individuals to actualize a sense of integrity over the potential for despair (Erikson et al., 1986). It must be conceded

however that there is still room for clarification and alternative interpretations, since this was by no means exhaustively explored in these interviews.

Community investment and compassion. Regardless of the potential presence of elitism or not, there is a clear and strong sense of community reflected in these findings. With few exceptions, all participants described the setting as being a caring place. Few attributed this caring to the staff or the program, seeing instead the primary source of care emanating from the other residents. Residents make it clear that the level of reciprocity in this community is very different from their experience prior to entering the facility. Residents are cared for, and by, fellow residents here. This is contrasted by the recurrent concern raised by participants that the facility does not provide assistive living. It seems that if needed, residents will be inclined to care for each other, in spite of the fact that the facility does not provide for this level of care.

The findings make a clear assertion that the community is mobilized to support individuals around age-related losses. The universal sense that 'we are all in this together' came through loud and clear across focus groups. In addition to being able to relate based on a commitment to education, the other shared reality in the community is the aging process. This reality is described in simple terms of helping get someone's walker for them, to more profound examples like being present for someone who is actively dying. Participants clearly define a sense of 'communal coping' as a reciprocal process that allows members to both give and receive assistance and care (Lyons, Mickelson, Sullivan, & Coyne, 1998; Omoto & Aldrich, 2007).

Dining room is the center of the social universe. In Lasell Village, the dining room and related policies have a profound role in promoting socializing amongst participants. This finding is confirmed by Omoto and Aldrich's (2007) research of three retirement communities; two having open and voluntary seating, and one with assigned seating that rotated on a regular basis. Their findings suggested that the setting with the assigned rotation of seating was less likely to encounter cliques and had an enhanced sense of community. This is interesting in comparison to this study. While participants confirmed that there were cliques at meals, and having to make nightly dinner dates were problems associated with the dining policy, they were adamant that it did not warrant a change in policy. Participants in this study favor free choice and autonomy in planning social/meal engagements.

Perhaps the most important finding in the area of socialization is that the setting of Lasell Village affords participants the opportunity to make new friends. This finding contrasts poignantly with participants' descriptions of loneliness and isolation before entering the facility. All agreed that they could not have 'expanded their horizons' as much while living in the outside community. While meeting new people is enjoyed and valued, the nature of the relationships seems more intimate at this stage of life. Residents are required to make a dinner reservation if they are a party of five or more – "but no one ever does." At first glance this aspect of making friends may seem inconsistent with Tornstam's (2005) notion of increasing solitude and intimacy as elders move through gerotranscendence. I am inclined to argue that it is not inconsistent, that what residents are referring to is maintaining a level of close relationships with peers. Access may afford

these participants the luxury of maintaining more close intimate relationships than if not

within this context. Both the quantity and quality of the relationships seem consistent

with gerotranscendence. Residents describe having more and closer friendships. They

readily acknowledge that relationships are deeper in the CCRC. For instance, some

participants shared having existential philosophical debates at meals, not run of the mill

social conversation, but consistent with Tornstam's (2005) ideas on gerotranscendence.

Rowe and Kahn (1997) assert the importance of socialization and thus avoidance

of isolation as a means to promote successful aging. For participants, it is safe to say that

socialization is alive and well at Lasell Village, but not without some effort on the part of

residents. The participants in this study see a direct connection to staying active and

involved as a means to prevent depression. There are numerous references to avoiding the

temptations to retreat off on your own. The community strives to keep watch; if someone

does not show up to the dining room, fellow residents note the absence and make efforts

to understand why.

Education promotes successful aging. Participants also describe the educational

requirement as providing a structure that promotes active participation. While they made

it clear that the requirement was not the primary reason for their educational

involvements, they also acknowledged that it provided a useful structure and expectation

for their engagement. It appears to be more than just adhering to the course schedule to

show up on time for class. The work of both college and/or Village classes provides

structure and challenges which affects participants' daily routines. Homework, reading

assignments, and meetings for group projects all serve to fill the time of these participants

with meaningful activity. This use of meaningful activity to support function and promote successful aging is consistent with much of the literature (Fisher & Specht, 1999; Harold, 1992; Jenkins et al., 2002; Keyes et al., 2002; Law et al., 1996; Lawton, 1972; Reker, 2002; Rowe & Kahn, 1997; Ryff, 1989b; Schneider, 2003; Stevens-Ratchford & Diaz, 2003; Steverink & Lindenberg, 2006; Tabbarah et al., 2002).

The component that is less well understood is the specific impact that educational activities have on the well-being of elders. The educational components identified here seem to work in combination to promote the successful aging of these participants including keeping active (intellectually and physically), and social engagement (Rowe & Kahn, 1997). An additional aspect that has been identified by some, is the potential for novel experiences and new challenges. But again, Tornstam (2005) suggests that positive aging is more than just keeping active. It cannot be overstated that the intellectual disposition of the residents affects the content and nature of all interactions with the Village community. There are components of thoughtful contemplation, intellectual discourse and debate, that are equally likely to occur in the dining room as in the classroom. Educational activities are no longer seen as an extension of the productive mid-life, and tend to be more aesthetic in nature.

Participants often jokingly acknowledged that education helps them to maintain their brains. While they spoke of the importance of on-going cognitive stimulation being good for them, no one saw educational activity as prophylaxis to the possibility of developing dementia. Personally speaking, I found this a bit surprising. It seemed to me in preparation for this study, that the value added of selecting a program that emphasizes

cognitive stimulation would be to prevent cognitive decline. Perhaps it is a generational attitude that diseases happen and there is nothing you can do about it. If it is generational, it may well shift as the consumer driven baby-boomers begin to fill the CCRCs.

Confronting death as a community. One of the real challenges of successful aging is to manage one's own impending mortality. As previously noted, I was surprised by how open participants were to sharing their fears, ideas, and coping strategies about death and dying. At least partly, this was unanticipated because I had conceptualized the setting, given that it was on a college campus, as more age-integrated. In fact, the Village itself is a typical age-segregated facility. Omoto and Aldrich (2007) described similar experiences with their participants expressing concerns about how much they confronted death in an a retirement community. As Alice jokingly wonders, "do you think age has something to do with it?" While most can objectively suggest, of course it is to be expected; it does not make it much easier to cope with.

Participants pointed out, some with a tone of criticism, that the facility is not involved with providing a structure or rituals for coping with such losses. In response to the apparent concentration of deaths that had occurred just prior to my interviews, a number of participants described neighbors hosting events for residents to acknowledge the death and remember the life of someone who had died. Those who experienced these reported that they were very useful, and those who had not were very interested in them. It seems that this may well be an opportunity for the community to establish this practice as a ritual to promote communal coping (Lyons et al., 1998). This concept of communal coping further amplifies the community emphasis on care and compassion. Participants

readily acknowledged that their concern for other's ability to mourn effectively, as well as their own ability, motivated the need for community rituals.

Intergenerational Realities

There seems to be a rather large void between the concept of living and learning on a college campus and the reality of practice at Lasell Village. Not only does there appear to be a disconnect between concept and practice, but also, participants seemed to report contradictory perceptions. For example, most participants agreed that the intergenerational connection with college could be stronger. Many suggested that they have little or nothing to do with the college. And yet almost universally participants described valuing either formal or informal intergenerational experiences because of the college affiliation. At times it was as simple as having the opportunity to watch people out the window of ones' apartment. All participants pointed emphatically to the positive interactions they have with the college students who work in the dining room. It seems that the shared (between the college, administration, and residents) definition of intergenerational engagement could be expanded to better encompass a balance of the both the formal and informal opportunities in the facility.

It seems that as an artifact of being sited on a college campus, the accepted definition of intergenerational engagement relates to taking classes on campus with traditional-aged students. Kaplan, et al. (2006), define intergenerational engagement broadly as any cross-generational interaction for the purpose of education or resource exchange. Thus the Village perception that intergenerational experience involves residents going to the college to take classes may well be too restrictive. A more

pluralistic idea of the range of potential intergenerational engagements and the possible

effects would be beneficial.

Participants took an active stance in solving problems and proposing options for

solutions to enhance intergenerational communication with students at the college. One

of the alternatives raised suggested that the definition could be broadened to include more

extracurricular types of engagements. It was speculated that this might be difficult

because if the students were not getting academic credit perhaps they would not

participate. Two options were raised that seemed both creative and potentially viable. The

first was to include student singers in the Village choral group in preparation for a

combined production. And, the second was to consider starting an open discussion group

to explore issues of death and dying across generations. I had to set limits on myself, and

some of the participants, during these focus group discussions with the reminder that this

was phenomenological not action research.

Practice Implications

This research benefited greatly from the fact that the participants were articulate

and creative individuals who often made direct suggestions for how things could change

to improve participants' abilities to successfully age in the context of Lasell Village.

Perhaps the most consistent change that participants recommended was to add an assisted

living option on site. This would potentially incur additional costs or recalculations of the

fee structures, but it is seen as a necessary feature to support the potential for aging in

place. This recommendation reflects the deep importance of the setting offering residents

options that promotes safety and security. Consistent with their sense of empowerment

and personal causation, I was also informed that residents raised this issue at a recent strategic planning session with the new college president.

It also seems necessary for the facility to develop some structured rituals to facilitate communal grieving. Participants described an informal process that should be considered as a model to support the process of losing a member of the community. While it could be argued that there is nothing wrong with informal process, it lacks administrative credibility and there was some concern that certain residents might use it as a vehicle to promote their own religious beliefs. The facility needs to have a role in setting the agenda and overseeing that the session is carried out in a productive and inclusive manner.

The discrepancy between what participants say about intergenerational exchange, and how much they value the potential ought to be addressed. The facility should explore the flow of intergenerational opportunities and develop a broader more inclusive definition of intergenerational engagement within the community. This could include more emphasis on bringing college students into the Village for extracurricular opportunities: grief support; death and dying discussions; combined musical/choral group possibilities. It seems clear that the close relationship, including administrative structure, between the CCRC and the college is advantageous and should be considered the standard for such facilities.

Dining room policies should be re-evaluated. The importance of the dining room experience setting the tone for all socialization cannot be overstated. It might be important to collect some baseline information to consider changes. For instance, the

seating at the Captain's table should be monitored for a two week period to confirm if the same individuals are repeatedly sitting there. It is difficult to make an emphatic recommendation to move from open to assigned seating arrangement given participant perceptions that open seating is preferred. There may well be a model that would serve as a reasonable compromise. The model might include a rotating seating assignment Sunday - Thursday, changing monthly, with Friday and Saturday evenings offering open seating for personal dinner dates.

The lack of diversity and issues of elitism are troublesome. Facilities must consider all alternatives to enhance diversity of the CCRC community. Of course, funding resources weigh heavy in this area and are addressed below under policy implications. Presently, facilities, especially marketing personnel need to be ever cognizant of reaching out to the communities that will promote more representation of society within the facility. Colleges have to address similar issues and have developed strategies to enhance access and diversity on campus, perhaps there are lessons to be learned from this model.

While recognizing the need for enhanced revenues, especially in the present economic turmoil, college presidents are encouraged to consider adopting this model. While it potentially enhances revenue, it also provides a needed social good. With funding streams unclear and heightened competition for top tier students, establishing an affiliation with a continuing care retirement community may help to integrate the often competing demands of the presidency – maintaining financial viability and courting donors for bequests (Halligan, 2004).

Policy Implications

From a policy perspective our society faces many challenges as we seek to develop systems for the care and support of our aging population. It is evident from this and previous research that CCRCs provide a valued service that supports the concept of allowing the elder to age in place after the initial move in. A CCRC with the additional feature of a continuing education program, goes even farther in supporting the successful aging of residents. Access issues present the most pressing public policy issue. As Mia suggested, "that's not the ideal situation that we only cater to the wealthy." The major block to access is funding issues. Since there is no subsidy for CCRC programs (until nursing home level of care is needed), only our wealthiest citizens can consider this an option. Funding potentials are not easily identified. Perhaps as has been successful in other housing developments a model of mixed use would be beneficial to consider. In order for facilities to receive necessary permits and licenses to develop future programs, they have to develop a certain percentage of low income residences and accept HUD subsidies. This could serve the dual purpose of enhancing access for less affluent individuals, while potentially increasing the diversity of the community.

Perhaps the most controversial idea that I have had throughout conducting this research is to consider the potential to share funding across higher education and Medicare/Medicaid. A demonstration project could be set up to consider the costs associated with providing healthcare to individuals in a continuing care retirement community setting, and the benefits, revenue and otherwise, to the college must be better

understood. This policy implication serves as a reasonable transition to research implications.

Implications for Further Research

There is a relative paucity of research in the area of retirement communities. An increased focus on the dynamics of selecting and transitioning into such settings will be important, especially if we are successful at increasing access and diversity in this setting. Will the issues be the same across more varied demographics? One of the reasons why the findings in this study are so consistent with the findings of Omoto and Aldrich (2007) may well be the homogeneity of population being studied. We would do well not to over generalize until similar exploratory research can be conducted with more representative samples.

In keeping with this, we need a more widely accepted understanding of the needs of individuals in the Third and Fourth Ages. While the average age of participants in this study was in the mid-eighties, it seems to me that this sample better represents concepts of the Third Age – not the Fourth as the chronological age might suggest. Clarifying parameters that would allow for functional determinants might be useful in better differentiating the needs of this expanding demographic (James & Wink, 2007).

Research is needed that improves our understanding of the motivations for intergenerational engagements within higher education, on the part of both elders and traditional-aged college students. Throughout this study, I was aware that the participants held many beliefs about college students' motivation to engage in intergenerational exchange. These beliefs are affecting the quality of interactions, but may not be more

than assumptions or misconceptions. This can only be better understood with empirical research to clarify the factors that influence intergenerational engagement between these cohorts. In a related vein, it is not explicitly clear what the benefits of such engagements are to college students and/or to the elders.

This study identifies that self and identity issues are at play as individuals strive to preserve autonomy within a communal setting. This raises considerations for study if the structured model of CCRC competes with the more aesthetic needs for solitude and contemplation of the elder residents. Perhaps, rather than keeping residents young and active – we need to consider models that help people be old. The findings in this study do not seem to support this conclusion. One of the things that is clear from the analysis is that many of the participants are exploring their own sense of purpose and meaning, and using the supports of the community and educational program to accomplish this. It is clear that these older adults see their investment in education very different than they did previously. Kathy suggesting that she selects classes for pleasure; Mike acknowledging that he takes classes that he did not have time to take when he was working; and, Sam discussing that his pursuit of education now is different because he is not re-tooling for a professional purpose, are all examples of this shift in meaning.

Research that helps us clarify what the desired outcomes of aging are, and how to measure it would be incredibly helpful. Throughout this project I have struggled to piece together theoretical ideals to attempt to elucidate perceptions of successful aging – perhaps this is not even the right label for what is happening during the expanding cohort of Third Age, who are healthier and more productive than ever before.

Final Thoughts

This study confirms that there are many opportunities for successful aging within the context of a continuing care retirement community on a college campus. Participants have eloquently and freely described a rich environment, supporting them to evolve and develop – often in ways they had not anticipated.

The findings of this research strongly confirm that this model would be beneficial to replicate at many more institutions of higher education. It is intriguing to me that this model may have evolved by some happy coincidence. If in fact, the description is accurate that the educational requirements and program for the CCRC were not originally in the design scheme. It seems that the quest for enhanced revenue developed into a program that effectively promotes successful aging of elder residents. The close coupling of the aging in place, care, safety and security, education, amenities, and the supportive caring community work together to support elders to move forward toward gerotranscendence. The *Lifecycle of the Village Resident* (see Figure 4) conveys the essence of this study, that this transformation is profoundly influenced by the unique attributes of this special cocoon.

Figure 4

Lifecycle of a Lasell Village Resident

Death

Independent Living

Gerotranscendence

CCRC & Education

Successful Aging
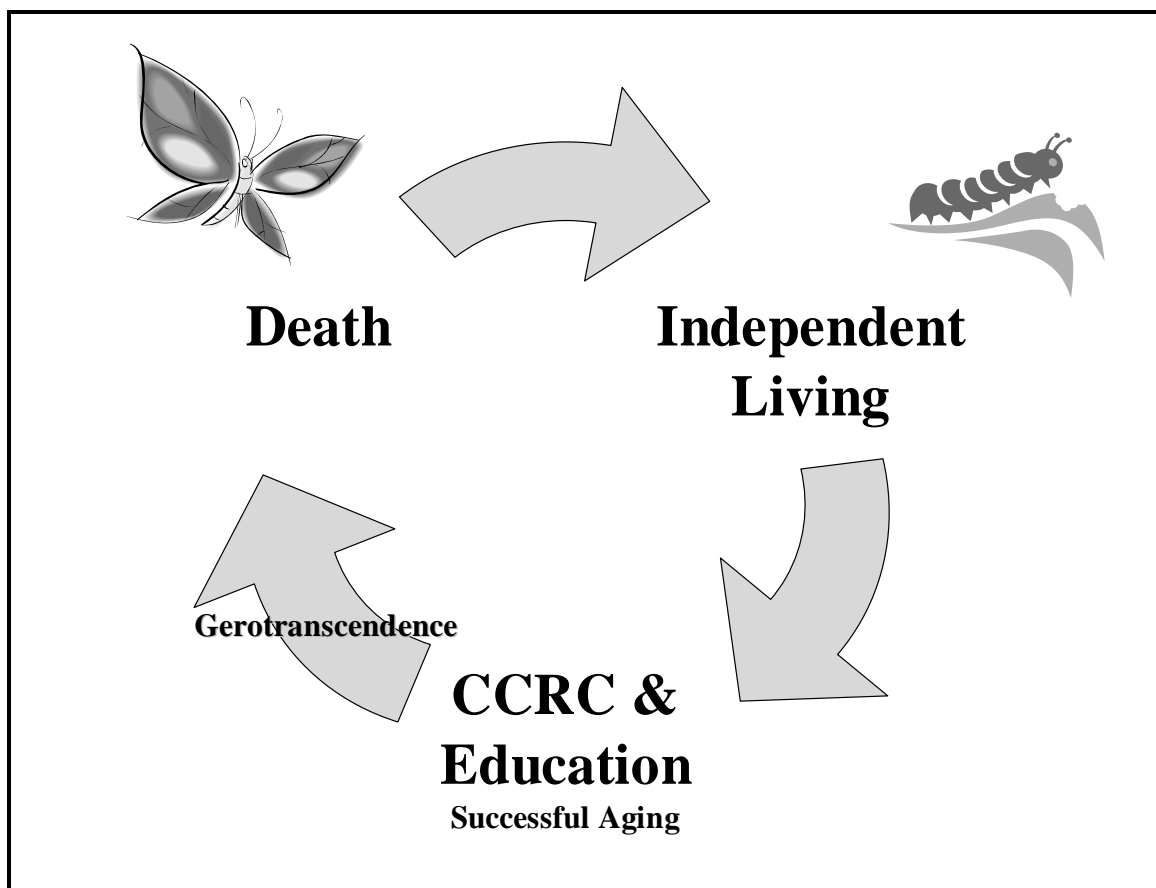
Future programs must address potentials for enhanced intergenerational programs that serve the needs of both elders and college students. Further attention has to be paid to enhancing the potential for more diverse communities in the future. This will require careful attention, since self-selection is an important factor in more homogeneous settings. College administrators would do well to not wear blinders when replicating this model. This program has the potential to enhance immediate revenue, but attention must be paid to the more long range benefits as well. Lease and use agreements coupled with opportunities to attract alumni back to campus to retire and potentially setting up donation plans may represent important long term revenue enhancements. At the same time, it is critical to appreciate the breadth of potential impact that a college affiliated retirement community has beyond revenues. This study suggests that higher education involvement has direct benefits to the individual elders, while making significant contributions to the perpetuation of our democratic society.

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Appendix A

BOSTON COLLEGE
Institutional Review Board

Office for Research Protections
Waul House, 3ʳᵈ Floor
Phone: (617) 552-4778, fax: (617) 552-0948

IRB Protocol Number: 08.319.01

DATE: June 26, 2008

TO: Scott Trudeau

CC: Karen Arnold

FROM: Institutional Review Board – Office for Research Protections

RE: Elder Perceptions of Higher Education and Successful Aging

Notice of IRB Review and Approval
Expedited Review as per Title 45 CFR Part 46.110, FR 60366, FR, # 7

The project identified above has been reviewed by the Boston College Institutional Review Board (IRB) for the Protection of Human Subjects in Research using an expedited review procedure. This is a minimal risk study. This approval is based on the assumption that the materials, including changes/clarifications that you submitted to the IRB contain a complete and accurate description of all the ways in which human subjects are involved in your research.

This approval is given with the following standard conditions:

1   You are approved to conduct this research only during the period of approval cited below;
2   You will conduct the research according to the plans and protocol submitted (approved copy enclosed);
3   You will immediately inform the Office for Research Protections (ORP) of any injuries or adverse research events involving subjects;
4   You will immediately request approval from the IRB of any proposed changes in your research, and you will not initiate any changes until they have been reviewed and approved by the IRB;
5   You will only use the informed consent documents that have the IRB approval

date_s
stamped on them (approved copies enclosed).

6 You will give each research subject a copy of the informed consent document;
7 **You may enroll up to 50 participants.**
8 **If your research is anticipated to continue beyond the IRB approval dates, you must submit a Continuing Review Request to the IRB approximately 60 days prior to the IRB approval expiration date. Without continuing approval the Protocol will automatically expire on June 26, 2009.**

Additional Conditions: Any r*esearch personnel that have not completed CITI education certificates should be removed from the project until they have completed the training. When they have completed the training, you must submit a Protocol Revision and Amendment Form to add their names to the protocol, along with a copy of their CITI education certificate.*

Approval Period: **June 26, 2008- June 25, 2009**

Boston College and the Office for Research Protections appreciate your efforts to conduct research in compliance with Boston College Policy and the federal regulations that have been established to ensure the protection of human subjects in research. Thank you for your cooperation and patience with the IRB process.

Sincerely,

Stephen Erickson Interim Director Office for Research Protections

mg

Appendix B

August 1, 2008

Hello Lasell Village Residents!

I am a doctoral student at Boston College, Lynch School of Education, completing my PhD in Higher Education Administration. I have been an occupational therapist for many years, working with older adults in a variety of settings. I am very interested in bettering our understanding of the factors that support us as we age. As such, I have been working with Dr. Mark Sciegaj, in collaboration with Dr. Paula Panchuck, to better understand how a program like Lasell Village works, and I would very much like an opportunity to hear your opinions.

As a resident of Lasell Village, you have a unique perspective on the topic of aging on a college campus. I am writing to invite you to participate in a research study titled, Elder Perceptions of Higher Education and Successful Aging. If you agree to participate you will be assigned to a small discussion group (about 6 – 8 participants). The group will have a one time meeting to answer a variety of questions like; how is it that you typically meet the 450 hour education requirement? What is it like being an older adult living on a college campus? We will also have general discussions about your experiences of living at Lasell Village.

If you are interested in more information, I will be introducing myself at the Resident Managers Meeting on **Thursday, August 7, 2008 at 2:00 PM.** Please come for more details. If you cannot make this meeting, but might be interested, please give me a call, Scott Trudeau 978-944-0307. Or you can e-mail me at trudeasc@bc.edu .

Thank you so much for considering sharing your experiences of a retirement community on a college campus with me.

Scott A. Trudeau es
Scott A. Trudeau, PhDc, MA, OTR/L
Doctoral Candidate
Boston College

Appendix C

Lasell Village

Dr. Paula Panchuck, Executive Director and Dean   August 4, 2008

Please consider participation in a research study at Lasell Village

Elder Perceptions of Higher Education and Successful Aging

conducted by Scott. A. Trudeau, MA, OTR/L
Doctoral Candidate for a Ph.D. in Higher Education Administration
Lynch School of Education at Boston College.

Researcher Scott Trudeau is interested in your unique perspective on the topic of aging on a college campus! As part of his doctoral research, he would like to conduct several small group resident discussions at Lasell Village during the weeks of August 18 and 25.

Each participant will attend one group session that will be approximately two hours long. Scott would like to interview people who have taken courses at the College as well as those who have taken courses at the Village.

All participants will be asked to sign an informed consent form (required of all responsible human research) and provide basic demographic information

as part of the study. Assistance in reading or completing this information will be provided by the researcher's assistant.

Feel free to take one of Scott's letters of introduction in the envelope below. A copy of this notice is printed on the back of his letter.

Scott will be present at our Resident and Managers meeting on Thursday, August 7 at 2 PM in the Ballroom to briefly introduce himself to the community, to provide further details about his study, and to answer questions that you may have about participation.

Appendix D

Boston College Informed Consent Form

Lynch School of Education
Informed Consent for Participation as a Subject in

Elder Perceptions of Higher Education
and Successful Aging

Investigator: Scott A. Trudeau, MA, OTR/L
Dissertation Advisor: Karen Arnold, PhD
Consent Form
Date Created: March 7, 2008

Introduction
- You are being asked to be in a research study of the impact that lifelong learning has on your attitudes about aging.
- You were selected as a possible participant because as a resident of Lasell Village you have a unique perspective to understand the interaction of higher education and aging issues.
- We ask that you read this form and ask any questions that you may have before agreeing to be in the study.

Purpose of Study:
- The purpose of this study is to better understand the factors that contribute to aging in a community like Lasell Village. We will explore the effect that having access to formal educational programs has on your aging.
- We hope to recruit about 40 participants from the Lasell Village community to participate in this study.

Description of the Study Procedures:
If you agree to be in this study, we would ask you to complete a brief (approximately 5 minutes to complete) questionnaire providing me with background information about yourself (age, gender, educational background etc.). I would then invite you to participate in a small focus group of about 6 – 10 residents to discuss issues related to aging well on a college campus (approximately 90 minutes). Within two weeks of your group participation a researcher will contact you by telephone to follow up on any issues from

the group and to ask you some specific questions about your perceptions of how you are aging (total time approximately 30 minutes). You may be invited to voluntarily participate in a follow up interview with the researcher to review and critique the findings from this study.

Risks/Discomforts of Being in the Study:
- There are no reasonable foreseeable (or expected) risks to participating in this study. There may be unknown risks.

Benefits of Being in the Study:
- The purpose of the study is to improve our understanding of the interaction of older adults and higher education.
- Participants in this study may increase awareness of issues related to aging in a college context.
- Improved understanding of higher education's contributions to aging may influence future research, policy and program development decisions.

Payments:
- While there is no direct reimbursement, participants will receive light refreshments during the group sessions.
- Participants will be awarded 2 Lasell Village continuing education hours for participating in this study.
- Upon completion of the study the researcher will provide a lecture for participants to learn about the results of this study.

Costs:
- There is no cost to you to participate in this research study.

Confidentiality:
- The records of this study will be kept private. In any sort of report we may publish, we will not include any information that will make it possible to identify a participant. Research records will be kept in a locked file.
- All electronic information will be coded and secured using a password protected file. Audiotapes will be used primarily for transcription purposes, and will be listened to only by members of the research team. Once transcription of the tapes is complete, they will be destroyed.
- Access to the records will be limited to the researchers; however, please note that regulatory agencies, and the Institutional Review Board and internal Boston College auditors may review the research records.

Voluntary Participation/Withdrawal:
- Your participation is voluntary. If you choose not to participate, it will not affect your current or future relations with the University or with Lasell Village.

- You are free to withdraw at any time, for whatever reason.
- There is no penalty or loss of benefits for not taking part or for stopping your participation.

Dismissal From the Study:
- If you are unwilling or unable to participate in the procedures outlined above you will be dismissed from the study.

Contacts and Questions:
- The researcher conducting this study is Scott A. Trudeau. For questions or more information concerning this research you may contact him at 978-944-0307, or by e-mail: trudeasc@bc.edu.
- If you believe you may have suffered a research related injury, contact Scott Trudeau at 978-944-0307 who will give you further instructions.
- If you have any questions about your rights as a research subject, you may contact: Director, Office for Human Research Participant Protection, Boston College at (617) 552-4778, or irb@bc.edu

Copy of Consent Form:
- You will be given a copy of this form to keep for your records and future reference.

Statement of Consent:
- I have read (or have had read to me) the contents of this consent form and have been encouraged to ask questions. I have received answers to my questions. I give my consent to participate in this study. I have received (or will receive) a copy of this form.

Signatures/Dates

Study Participant (Print Name) : _____

Participant Signature : _____ Date _____

Appendix E

Lasell Research Questionnaire

AGE: _____

SEX (Circle):
    Male   Female

MARITAL STATUS (Circle):
    Married
    Partnered
    Single/Never married
    Divorced
    Widowed

RACE (Circle):
    White
    Black or African American
    Hispanic or Latino/a
    American Indian or Alaska Native
    Native Hawaiian or Pacific Islander
    Multiracial – Specify
_____

How long have you lived at Lasell Village (Insert numbers below)?

    _____Years _____Months

Highest level of education <u>completed</u> (Circle)?

Incomplete High School

High School (diploma or GED)

Associates

Baccalaureate (BS; BA etc.)

Masters (MA; MS; MBA etc.)

Doctorate (PhD; MD; EdD etc.)

Other (specify):

Below, please estimate the number of hours in the past year that you have devoted to the following educational activities.	
ACTIVITY	**ANNUAL HOURS**
Hobby classes	
Retirement/financial planning seminars	
College classes	
Working towards a degree	
Lifelong learning institute	
Elder Hostel trip	
Personal Reading	
Book Club	

Other (specify)	
Other (specify)	
Other (specify)	
Other (specify)	
Other (specify)	
Other (specify)	
Other (specify)	

In your own words, please describe the process you went through deciding to move to Lasell Village.

What changes did you have to make in order to move?

Who was influential in your deciding (family, friends, others)? How did they influence you?

Describe the factors that most attracted you to Lasell Village.

What concerned you most about moving to Lasell Village?

What, if any, relationship or experience did you have with Lasell College/Village prior to deciding to move to the Village?

When you consider your physical health, would you say that compared to others your own age that your health is (circle one):

       Better than.

       About the same as.

       Not quite as good as.

       Much worse than.

Please list all the medical conditions for which you are currently being treated.

If money were no object, what could change about living at the Village that would improve your experience?

Appendix F

Focus Group Question Protocol
Elders in Higher Education

Introduction: Good morning/afternoon.

Thank you for agreeing to participate in this group meeting. As you can see from the consent forms, today we are going to discuss issues related to your living and learning here at Lasell. Of particular interest to my research are your perspectives on how living on a college campus influences your aging process.

Restating what was noted in the consent form that you signed earlier, the information discussed in this meeting is confidential. In an effort to free people up to openly discuss their experiences, I ask that you keep what is discussed here today in this room. Any questions about this particular aspect of the discussion?

The group meeting will take about one and half-hours. I'll start by asking you to introduce yourself, and tell us how long you have lived here at Lasell. From there, I will ask you three main questions. I ask that people speak one at a time, and that we respect each other's responses. If at any time you do not feel comfortable answering a question, feel free to pass. Does anyone have any questions?

Focus Group Questions & Probes

1. Describe for me what it is like to retire here at Lasell Village.

Probes:

♦ What are the advantages of retirement living at the Village?
♦ What are some of the disadvantages?
♦ Has living here changed your lifestyle? How?

♦ Describe the interactions that you have with students 18 – 25 years of age.

2. Tell me what the continuing education requirement at the Village means to you.

Probes:

♦ Is this what you want and expected?
♦ How do you manage to meet the educational requirement?
♦ Describe for me one of your most positive (exciting, favorite) learning experiences since participating in Village education activities.
♦ What, if anything, poses a challenge to meeting the required hours?
♦ In what ways does the requirement directly affect your daily life positively?
♦ In what ways does the requirement directly affect your daily life negatively?
♦ What kind of educational activities do you use to accomplish 450 hours?
♦ How do you select the courses you use to meet the requirement?
♦ If you have taken classes with traditional aged students, describe this for me.
♦ If you have not taken campus classes, why not?

3. What could be changed to improve your life in retirement on a college campus?

Thank you for your candid responses. Does anyone have anything to add to our discussion?