

Under One Roof:

A Guide to Starting and Strengthening Intergenerational Shared Site Programs



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Strengthening Intergenerational
Shared Site Programs*



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ABOUT GENERATIONS UNITED

Generations United (GU) is the national membership organization focused solely on improving the lives of children, youth, and older people through intergenerational strategies, programs, and public policies. GU represents more than 100 national, state, and local organizations and individuals representing more than 70 million Americans. Since 1986, GU has served as a resource for educating policymakers and the public about the economic, social, and personal imperatives of intergenerational cooperation. GU acts as a catalyst for stimulating collaboration between aging, children, and youth organizations providing a forum to explore areas of common ground while celebrating the richness of each generation.

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DEDICATION

This guide is dedicated to the children, youth and older adults who thrive in intergenerational shared site programs and to the many talented and innovative individuals and groups across the country who work together every day to break down the artificially created barriers between the generations.



Photo by Mary Beth Burkholder

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Introduction

OVERVIEW

Intergenerational shared sites are increasingly uniting generations through planned activities and informal interaction; however, a comprehensive guide on how to design and develop these dynamic facilities did not exist. Thus, Generations United, with the support of MetLife Foundation, created *Under One Roof: A Guide to Starting and Strengthening Intergenerational Shared Site Programs*.

Intergenerational shared site programs are defined as those in which children/youth and older adults participate in ongoing services and/or programming concurrently at the same site, and where participants interact during regularly scheduled, planned intergenerational activities, as well as through informal encounters.¹ By constructing innovative facilities, intergenerational shared site programs allow for the expanded use of resources by utilizing and sharing those readily available. In addition to satisfying the needs of children, youth and seniors, appropriate design and facilitation breaks down spatial and conceptual barriers that have the potential to inhibit interaction between younger and older people.

Intergenerational shared sites vary in structure, but are generally composed of two program components: one



Photo by David Greenfield

that serves older adults and another that serves children/youth. In addition, many facilities make use of designated “shared spaces” that concurrently accommodate both populations, and create opportunities for additional spontaneous intergenerational interaction.²

The following chart lists some of the most common program components:³

OLDER ADULT COMPONENTS	CHILD/YOUTH COMPONENTS
Adult Day Services Center	Childcare Center
Assisted Living/Residential Care	Before/After School Program
Continuing Care Retirement Community	Head Start Program
Nursing Home	Early Childhood Program
Senior Center	School (K-12, College/University, Vocational/Technical)
Senior Housing Facility	Youth Recreation Program
Community Recreation Program	Camp
Geriatric Care Unit	Pediatric Care Unit
Alzheimer’s Care Unit	

SEAGULL SCHOOL KAPOLEI, HAWAII

“What, I don’t come here to just tell story, I want the plants green,” Lou, a dark haired assertive Hawaiian in a wheel chair, expressed during a garden project at Seagull School’s intergenerational shared site in Kapolei, Hawaii. Lou and some of his fellow seniors, known as Kupuna, taught children how to pot, water and sustain plants such as basil, oregano, green onion and mint. While engaged with his young partner, Lou told stories of how the people of Oahu once lived off the land, and reminded the students time and time again that like people, plants need water to live. “I pray for the plants every night,” he told Hawaii Intergenerational Network project facilitators before a caregiver guided him into the Adult Day Care facility for lunch. At the garden project culmination, children, seniors and staff joined together for a celebratory lunch of lasagna with garden-grown herbs, while paying tribute to the hard work of two generations.⁴

Although most intergenerational shared sites typically serve participants that are under the age of 12 and those over the age of 50, there are also programs that serve middle school, high school and even college-age youth and young adults. Age and developmentally appropriate activities with specific goals are developed accordingly.

Rationale for Intergenerational Programming

Young and old people walk the same streets together, but routinely on opposite sides. Primarily in the last 50 years, changes in Western Culture have led to an increased generational disconnect.⁵ Technological innovation, a continually changing economy and the weakened role of a family’s elders, are social changes that reduce the potential for age integration.⁶ America’s cultural landscape is molding a relatively new sort of segregation, not only by race and class, but by age as well.⁷

At the same time that social changes have fostered a devaluation of older people, demographics show that the United States population is aging. In 2000, there were an estimated 35 million people 65 years of age or older, which is 13% of the total population.⁸ This compares to only 4.7% of the population in 1920 and

9.9% of the population in 1970.⁹ By 2030 the percentage of older people is expected to rise to about 20%.¹⁰ Between 1930 and 2001, mortality rates declined and life expectancy increased for all persons (all races and sexes) from 59 years to 77 years.¹¹ Hence, seniors are living longer, and opportunities for intergenerational interaction are at an all time high. (Please note that the terms older adults, elders and seniors are used interchangeably through this manual.)

Families often find themselves living states apart, often for economic reasons, and children sometimes have little, if any, interaction with their grandparents and older relatives. Amy Goyer of AARP writes, “This represents an opportunity to influence the development of services using an intergenerational approach such as [intergenerational shared site] programs, which improve the quality of life for participants, and can also improve the quality and effectiveness of services.”¹²

Foundation for Intergenerational Shared Sites

Although the growth of retirement communities in states like Arizona, California and Florida is not especially conducive to intergenerational relationship building, many retired seniors seek volunteer opportunities in their community at-large.¹³ For those seniors in need of formal care, institutionalized settings have been created accordingly. Independent living, continuing care retirement communities and adult day programs are just a few examples. While long-term care residential services are only used by 5% of the senior population at a time, 25% to 35% of all older adults are likely to spend some time in a nursing home.¹⁴

Likewise, children spend a great deal of their time in day care centers and schools (including preschool, elementary, middle, etc.) where they are cared for. Changes in family structure and increased work hours have contributed to a higher demand for child care services over the last few decades, and as formal child care is becoming more common, the ability to secure arrangements is becoming more difficult and costly.¹⁵ In communities nationwide, children and seniors alike now spend a great deal of time in the hands of care providers.

Quality care has become a national concern for both children and seniors. In response, intergenerational shared sites have been structured to simultaneously serve the needs of multiple generations. These facilities act as a mechanism to bridge the generation gap, provide

integrative services and offer opportunities for young and old to build mutually beneficial relationships. Whether children and seniors are reciprocating knowledge and skills or working together on an art project, new relationships continue to develop at intergenerational shared sites. With multiple outcomes of sharing resources (financial, material and people) and serving young and old, these innovative facilities will continue to help build a future that satisfies the needs of all generations.

OVERVIEW OF CHAPTERS

This guide provides information to help in the development of intergenerational shared sites and act as a resource that integrates many disparate strands of information about intergenerational shared site programming. Generations United, working with a national advisory group developed the framework for this guide and requested the following seven chapters from noted professionals from various disciplines with practical knowledge on intergenerational shared sites. We think the final product not only coalesces the collective expertise of this interdisciplinary group, but also highlights some of the rich experiences and insights from programs around the country. The following provides a brief overview of each chapter:

Chapter 1 Visioning and Assessment:

- The Relationship between Vision, Mission and Goals
- Key Components to Include in an Assessment Process
- Primary Assessment Tools and Approaches
- Legal and Accreditation Requirements
- Program Components to Include in Your Model
- Valuable Visioning and Assessment Resources

Chapter 2 Funding and Partners:

- The Guiding Principles of Fundraising
- Characteristics of Today's Donor
- The Importance of Revenue Diversity
- Maximizing a Board, Fundraising or Campaign Committee

- Identifying Potential Funding Sources
- Undertaking a Capital Campaign
- Receiving Donated Property
- Maximizing Available Resources, including a List of Potential Federal Funding Sources and Government Reimbursement Programs

Chapter 3 Facility Design and Building:

- Overview of the Six Phases of the Building Project Process: Feasibility Studies and Needs Assessments; Programming; Design; Construction; Occupancy; and Post Occupancy
- The Place of Regulations
- Finding an Architect
- Selecting a Contractor
- Universal Principles and Common Design Concerns

MT. KISCO INTERGENERATIONAL COMMUNITY, NEW YORK

Every morning, one of the toddler groups visits the Senior Wellness Room for dance and exercise where toddlers have made wonderful connections with the seniors. The time came for “Joey” to leave the toddler group and join a preschool group, but he was not happy. He missed his friends, and cried every morning. One day the teacher asked “Fred,” one of the senior friends, if he would meet Joey for a morning breakfast in the preschool. Fred agreed, and it worked like a charm. When Joey arrived he saw Fred, ran into his arms, had breakfast and played with his friends. This went on for several days until Joey made a successful transition. After the teachers thanked Fred and told him that he could go back to the senior dining room for breakfast, he replied, “No way, I’m staying with Joey!” What a great intergenerational solution to a common problem.¹⁶



Photo by Jason Simon

Chapter 4 Staff Development, Training and Retention:

- Rationale for Professional Development and Cross-Training
- Processes and Procedures Required to Ensure Reciprocity Between Staff Working with Children, Youth and Seniors
- Techniques for Cross-Training and Professional Development
- Retention Tools Required to Empower, Educate, Respect and Appreciate Staff
- Ways to Foster Staff/Board Buy-In
- Benefits of an Intergenerational Coordinator

Chapter 5 Marketing:

- Approaches for Marketing an Intergenerational Shared Site
- Overview of the Five Steps in the Marketing Process: Setting Goals; Positioning the Organization; Conducting a Marketing Audit; Developing a Marketing Plan; and Developing a Promotional Campaign
- Internal and External Promotion Strategies

- Marketing Resources

Chapter 6 Curriculum Development and Intergenerational Activities:

- Overview of the Relationship between Vision, Philosophy, Goals and Curriculum
- Key Points to Consider when Developing Curriculum
- How to Plan the Curriculum
- Ways to Maximize Informal Curriculum
- Analysis of Three Case Studies

Chapter 7 Evaluation:

- Key Evaluative Questions
- Three Types of Evaluations: Formative, Program Monitoring/Process and Impact
- Practical Evaluation Considerations
- Promising Practices, including a Discussion of Multiple Methods, Multiple Perspectives, Multiple Points of Evaluation and Multiple Resources
- Sample Tools, including Observations, Interviews, Surveys, Administrative Data and Environmental Assessments
- Step-by-Step Checklist

CONCLUSION

Generations United has designed *Under One Roof: A Guide to Starting and Strengthening Intergenerational Shared Site Programs* to help you either open the doors of new intergenerational shared sites or enhance the effectiveness of existing programs. It is our hope that this guide will not only serve as an informational resource, but that it will generate additional discussion, creative partnerships, and innovation in intergenerational shared site settings across the country.

- ¹ Goyer, A. *Intergenerational shared site and shared resource programs: current models*. (2001). Generations United Project SHARE Background Paper. Washington, DC: Generations United.
- ² Ibid.
- ³ Ibid.
- ⁴ Hawaii Intergenerational Network. (2002). *Seagull Schools Shared Site Program Evaluation*. Kailua, Hawaii: Author. p. 11.
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- ⁶ Kalache, A. (1996). Ageing worldwide. In Ebrahim, S. & Kalache, A. (Eds.), *Epidemiology in Old Age* (pp. 22-31). London: BMJ Publishing Group.
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- ⁸ American Association on Aging Statistics. (2000). *Older Americans 2000: Key Indicators of Well-Being*. <http://www.agingstats.gov/chartbook2000/default.htm> Retrieved January 2005 from www.agingstats.gov.
- ⁹ Cogwill, D. (1974). The aging of populations and societies. *Annals of the American Academy of Political and Social Science*, Vol. 415, p. 1-18.
- ¹⁰ American Association on Aging Statistics. Retrieved January 2005 from www.agingstats.gov.
- ¹¹ National Center for Health Statistics. (2003, September). *National Vital Statistics Reports*, 52 (3).
- ¹² Goyer, A. (2001). p. 18
- ¹³ Newman, S, et al. (1997).
- ¹⁴ Whitlatch, C. & Noelker, L. (1996). *Caregiving and caring*. Encyclopedia of Gerontology, Volume 1.
- ¹⁵ Hofferth, S. (1996, Summer/Fall). *Child care in the United States today*. The Future of Children: Financing Child Care, 6 (2).
- ¹⁶ Intergenerational shared site experience was provided December 2004 by Dawn Meyerski of Mount Kisco Day Care, Mt. Kisco, NY.

Chapter One Visioning and Assessment

By Amy Goyer

INTRODUCTION

The benefits of intergenerational shared site programs are many—for the participants of all ages, for the community and for the organization(s) involved.¹ Since you are reading this manual, it is likely that you are already sold on the general concept of intergenerational shared site programs; however, you may be searching for a program model that makes sense in your community; you may have an idea for a specific program; or you may already be engaged in an intergenerational shared site program. Regardless of where you are in the process—investigating the possibilities, planning, implementing or re-assessing an intergenerational shared site program—there are some key steps to consider as you form and adjust your vision. Solid program development methods should be employed throughout the process. These methods include:

- Conducting assessments,
- Creating goals and objectives,
- Developing partnerships and collaborative efforts,
- Addressing legal and accreditation matters,
- Creating a program model (including addressing supplementary services, such as transportation),
- Developing a fundraising plan,
- Designing facilities,
- Providing for staffing and volunteers (including ensuring adequate training),
- Developing a marketing and public relations plan,
- Planning quality intergenerational activities, and
- Integrating evaluation throughout.

While you may not always follow these steps in the specific order presented in this guidebook, all these

program development steps are important for success; as such, they should be re-visited and re-assessed throughout the life of your program. This chapter will assist you in this process by providing you with an overview of the relationship between vision, mission and goals; the key components to include in an assessment process; the primary assessment tools and approaches; legal and accreditation requirements; program components to include in your model; and valuable visioning and assessment resources.

VISION, MISSION AND GOALS

The development of a long-range vision is an ongoing process. You may have a dream or an idea, but a solid long-range vision will lead you to your mission, goals and strategies toward achieving those goals. You should create a vision statement that provides a picture of the desired future state, and gives stakeholders, potential partners, funders and participants a clear view of what you want to achieve. Your vision may involve your entire community, or it may focus on a specific service area or population. It is valuable to bring together stakeholders and engage in a group process to create a shared vision. This will establish buy-in from the beginning and provide support throughout the strategic planning, program development and implementation phases.

Once you have conducted an organizational and community assessment, and have chosen your program model, you should develop a written mission statement. The mission statement describes your program: the purpose, functions and how you pursue your vision of the future. Then, you can establish goals and objectives that strategically move your organization forward in achieving your mission and vision. These tasks can be accomplished in many ways—there is no one perfect method or linear process for strategic planning. Whether you are just starting out or if you have an established program that you want to re-evaluate, having a clear vision, a focused mission and realistic, achievable and measureable goals will keep your team aligned and moving together toward a successful future. There are several resources listed later in this chapter that may be helpful in implementing this strategic planning process.

ASSESSMENT

For the purposes of this chapter, assessment is defined as a comprehensive evaluation of the current status—of people, projects, events, communities, programs, services, organizations or anything else—that may have an effect on your program or that may inform your decision-making. As you develop your vision, mission and program implementation plan, it is important to assess the needs in your community as well as the existing services and resources that are in place to address those needs. Start by taking a look at the current situation in your community and/or service area; this involves determining where the gaps exist and what the unmet needs are. This process is essential to creating a successful business plan. Many programs have failed because founders did not adequately assess the need for the services they wanted to provide. No matter how wonderful your program is, if there is not a need for it . . . or if available funding is not adequate . . . or if people cannot easily access it . . . it will not succeed. A thorough, comprehensive look at existing assets and resources is as important as the needs assessment. Knowledge of various resources may give you ideas about program components and collaboration that you may not have considered. Once you determine what resources will be required to implement your vision, you will have an advantage because you will have a better idea of where to find those resources. If you have an existing intergenerational shared site program, it is still wise to periodically conduct a thorough assessment to determine if your program is meeting critical needs, if there are possible areas for expansion, if resources are being used prudently, and if the needs/resources in your community have changed over time. Consider the following aspects of assessment as you begin the process:

Organizational Assessment:

Take a good look at your own organization's (and your partner organizations') resources, capacity and commitment to the vision of an intergenerational shared site program. This involves an evaluation of the following areas: your existing programs or services, financials, facilities, resources, staff support, board support and potential for growth. This can be done by an internal or external reviewer who conducts an audit of your organization and reviews existing organizational documents, such as an annual report. Interviews, focus groups or surveys of staff can also be used. Where are your strengths? What do you bring to the table? Do you have adequate staff, facilities, financial resources,

expertise and/or services? Where are your weaknesses? In what areas will you need to build capacity? What will a collaborative partner need to bring to the table to complement what you already have to offer? Take a thorough and honest look at all of these issues. Without adequate resources and the internal support of your organization, you will be facing an uphill battle.

Community Assessment:

A comprehensive assessment of your community and/or service area will give you a full picture of the current unmet needs of people and organizations, as well as the current resources that exist in the form of programs, services, facilities and other key components. As you assess the needs and resources in your community, evaluation of the following key areas will be helpful:

- Population demographic data, including trends and projections.
- Needs of all age groups, including health, education, recreation, housing, mobility and economic status.
- Human resources, including talents and experience of staff, volunteers and potential participants of all ages.
- General community needs and resources, including public and private organizations, governmental agencies and corporations/businesses.
- Existing public and private congregate and in-home services and programs for people of all ages.
- Existing and planned facilities and community spaces (including community centers, libraries, parks and gardens.)
- Equipment and materials/supplies (including vehicles, furnishings, kitchen facilities, etc.)
- Funding sources.

Determining the Key Players:

Part of your assessment process involves learning about key organizations, experts and leaders in your community who can be resources to your program. As you conduct your resource and needs assessment, gather information about individuals and organizations that are key stakeholders, or that might be potential collaborative partners, Board members or advisory council members. Before

venturing into this new endeavor, you will need to build a base of support and collaboration across your community. Collaborative partners can have a variety of roles. They may offer in-kind contributions, funding, services or other key assets. These relationships may be formal or informal partnerships. Whether serving as a Board member, advisor, full partner or informal collaborator that helps provide referrals or promote your program, these people and organizations may be critical to your success. It is a good idea to have a good balance of businesses, social service agencies, media, foundations, funders, educators and other key players in your community involved in your efforts.

Think about which organizations would complement the resources you bring to the undertaking. Issues to consider include:

- Do you need to partner with another existing program? Is there one that would like to expand or combine efforts?
- Are there organizations that could provide referrals to your program and/or to whom you could refer your participants for services you will not offer?
- Is there an organization that has extra physical space they might donate to you, provide as an in-kind service, or provide at a reduced rate as part of their social mission? Or, conversely, will you have space to offer a partner that would complement what you have to offer? Keep in mind that certain organizations, such as churches, synagogues or temples, often have space that is only used on certain days of the week. These organizations might be a great resource for space, as well as for volunteers and possibly existing program components.
- Will you need assistance with legal matters? Is there a nearby law firm that might provide pro bono or reduced fee services?
- Will you need background checks for volunteers in your program? Is there a nearby police station that might provide those checks as an in-kind contribution?
- Will you need to provide transportation for your participants? Is there a bus company, taxi company or organization with vans available with which you could partner or contract?



Photo by Austin Forbes

ASSESSMENT TOOLS AND APPROACHES

There are many tools and approaches that can help you in conducting needs and resource assessments. The following are some suggested ways to tackle this process. These tools can be used to assess your own organization as well as your community or service area. You will find additional resources and web links to assessment tools in the *Resource* section of this chapter.

Community Mapping:

Community mapping dates back to the 1890's with the early settlement house efforts of Jane Hull in Chicago and other sociologists of that era. Over the years it has been refined and developed into an excellent technique with which to begin your assessment process. As the name implies, you essentially create a map of the community and/or specific service area to be targeted. The map includes existing resources, with an overlay of key demographics and needs in the community. The map can include:

- Existing public and private programs/services, educational facilities, activities, institutions and businesses. These may include landmarks such as the barber shop, the bank, the gas station, the community center, the coffee shop, the newspaper office, the police station, the child care center and the nursing home.
- Population demographic data, such as age, heads of household, child care arrangements, etc.
- Other significant variables, including employment levels, income/poverty levels, housing, transportation, etc.

All aspects that make up your community and give you a sense of the “big picture” are important to include on the map, even things you think may not have anything to do with the program you have in mind. It is important to get a good overview of the community. You may find support for your program in unexpected places. For example, one intergenerational shared site program found that there was not a farmers’ market in their community; they now hold a farmers’ market in their parking lot on the weekends, providing a needed service in the community, while raising awareness about and funds for their program.

In community mapping, all the demographic data and other variables are overlaid against the physical location of the businesses, institutions, etc. in the community. The process of community mapping can give you a complete picture of your community and provide a basis for needs assessment and planning.

Existing Data:

There is a wealth of data about your community already in existence—you just have to know where to find it. If you start out with community mapping, you will have already gathered some of this existing data. But you will need to find out more about the needs and gaps. Often, you can get an indication of the needs in your community by examining existing data without the time and expense of conducting additional surveys or other formal needs assessments. Such data is often available to the public upon request. Some sources of existing data are:

- *The Census Bureau* collects data that can be broken down into state, county and local levels (e.g., census tract, zip code). This data is collected in the decennial census, as well as in additional surveys, such as the American Communities Survey. Data is collected about everything from age to head of householder to child care arrangements. Check www.census.gov for a complete listing of the types of data available and how to access the data about your community.
- *State, county and local government agencies* also collect data and/or conduct needs assessments about a variety of topics on a regular basis. Check your local government web sites or speak with your local officials about how to access that data.
- *Area Agencies on Aging (AAAs)* conduct periodic needs assessments that look at the needs of the aging in their planning and service areas. They assess the need for home- and community-based services, such as adult day services and long-term care needs. Each AAA is required, under the Older American’s Act, to create an Area Plan based on this needs assessment. This plan outlines how they propose to provide services to address the unmet needs. The Area Plan is also a good source of information about existing programs and services. In addition, county councils on aging often also conduct needs assessments, create public plans and provide information about programs and services across the county.
- *State, regional or county child and family agencies* assess the needs in their community for child care, before/after school care and other child/family services.
- *Local United Ways* often conduct needs and resource assessments as part of their fund distribution process.
- *School boards* have information about schools, extracurricular programs, educational needs and unused facilities.
- *Existing organizations and service providers* often maintain waiting lists for their services. The mere existence of a waiting list documents the need for that service.
- *Local Chambers of Commerce* have information about local businesses, and may have training and assistance available for developing a business plan.

- *Local libraries* are excellent central sources of information, including research reports, demographic data and public documents.

Surveys:

You may decide to supplement existing information with a survey or questionnaire of your own. It is a good idea to give a lot of thought to the specific outcomes you are looking for. Collect only the most pertinent information that will inform you about the possibilities for intergenerational shared site programs, the viability of your idea or the effectiveness of your current program. This will save both time and expense as you process the information you collect. You may want to consider hiring an objective external research expert to conduct the survey to ensure that the results are not tainted by subjective viewpoints. Some colleges and universities are able to conduct this type of research. Surveys can be conducted through the mail, via the telephone, online or in-person. You can survey prospective clients, potential partners/supporters, users of existing services or other intergenerational shared site programs. You may ask about their viewpoints and opinions, interest in your concept/vision, satisfaction with existing programs/services or their need for additional programs/services. A professional researcher can help you determine the sample size (number of people surveyed), how to target/focus your sample and where to find respondents. Surveys provide primarily quantitative data/information.

Focus Groups:

Another option is to gather groups of people from whom you would like to solicit input about their opinions, experiences and needs. Focus groups can be informal discussions, or they can be conducted by professionals who are trained to ask questions in an objective manner, then collect the data and prepare a written report. Many focus groups are videotaped so the results can be examined more closely. Focus groups provide qualitative data/information.

Interviews:

One-to-one interviews are also an option in conducting an assessment. You may want to conduct in-depth interviews with people who could be recipients of service, or with individuals who are leaders in the community, business owners, potential partners or issue experts. These interviews can supplement the information

gathered in more formal needs assessments to give you specific ideas and a deeper or more comprehensive view of the needs in your community. Interviews provide qualitative data/information.

LEGAL ACCREDITATION AND REQUIREMENTS

One of the critical issues to assess as you plan and implement an intergenerational shared site program is the legal requirements. There are city and county zoning laws and building codes that will determine if you can provide a service in the location you are targeting. Check with the appropriate city or county agencies about these requirements and how to get needed approvals. You may even need to advocate for changes in these laws, policies or requirements (See *Chapter 3: Facility Design and Building* for additional information).

Licensing and Regulations:

Intergenerational shared site programs and facilities must abide by federal, state and local regulations. Licensing standards for the various types of program components can have a major impact on facilities, staffing levels and staff qualifications/training.² In some cases, licensing may not be required, but there may be strict policies that programs must follow in order to receive funding.

Unfortunately, sometimes regulations for children's programs and those for older adult programs conflict with one another. Issues such as fire safety codes, immunization requirements, facility sanitation standards, nutritional requirements, staff/participant ratios and staff certifications may vary.³ In addition, requirements may vary from state to state, and interpretations of the regulations may not always be consistent across the state. As a general rule, regulations will require separate licensing for each individual program component of an intergenerational shared site program. While all states require the licensure of childcare facilities, states manage it in different ways. On the other hand, not all states require licensure for adult day care, and regulations vary considerably for those that do require a license (see Appendix 1-1). Nursing homes generally have very specific licensing requirements. Familiarize yourself with the various requirements as you progress through strategic planning so you are prepared for the challenges licensing and regulations present.



Photo by Hope Hawkins

Accreditation:

Accreditation is “a voluntary process that a facility or program may seek in order to obtain official approval and credentials from an authoritative body in the field.”⁴ Your intergenerational shared site program, or program components, may need to obtain specific licensing and/or accreditation to operate. Even if these are not requirements, you may want to work towards achieving these credentials because they can bring credibility to your program. As in licensure, there are often different accreditation requirements for the older adult and child/youth components. You will need to make sure the requirements do not conflict with one another, making it difficult for you to achieve your vision. You will want to plan your program with these requirements in mind from the beginning. Accreditation can often be an expensive process, costing thousands of dollars in fees and the expense of making adjustments to the program, staff and facilities. Accreditation is also a time-consuming process, often taking more than a year to prepare and accomplish. Accreditation will, however, demonstrate that your program has obtained a certain level of excellence and professionalism.

Accreditation may be obtained from one or more of the following organizations (See Appendix 1-1 for more information on accreditation and the contact information for these organizations).

Children’s Services:

- Council on Accreditation (COA)
- National Association for the Education of Young Children (NAEYC)

- National Early Childhood Program Accreditation, (NECPA)
- National After School Association (NAA)

Older Adult Services:

- Continuing Care Accreditation Commission (CCAC), sponsored by the Commission on Accreditation of Rehabilitation Facilities (CARF)
- Council on Accreditation (COA)
- Centers for Medicare & Medicaid Services (CMS)
- Joint Commission on Accreditation of Healthcare Organizations (JCAHO)
- National Institute on Senior Centers (NISC)
- Commission on Accreditation of Rehabilitation Facilities (CARF) in collaboration with the National Adult Day Services Association (NADSA)

Liability:

In planning an intergenerational shared site, you will need to learn about liability insurance and risk management practices. Liability risks are often age-specific, and may have an influence on which program components you choose to provide. The liability coverage may also direct important aspects of your business plan and the structure of incorporation or partnerships. Consult a well-qualified attorney and liability specialist about these issues. It is also beneficial to talk with other similar intergenerational shared site programs about their risk management practices and insurance coverage.

Zoning:

Public and private zoning regulations vary in different communities. You will need to find out if there are restrictions in the areas you are targeting. Commercial facilities or congregate housing may be restricted. You may be prohibited from providing child care in age-specific retirement communities—sometimes even in naturally-occurring retirement communities. Private communities may have zoning regulations that prohibit any businesses. You may be able to apply for a variance, but in some cases you may need to either advocate for changing the zoning restrictions or find an alternate site.

YOUR PROGRAM MODEL

Once you have conducted a thorough assessment and determined the needs, gaps and available resources, you will have some good ideas about the kinds of programs and services that might succeed in your target area. Now you can zero in on a specific program model. Again, you may already have an existing intergenerational shared site program, but you might want to consider adapting or expanding your program components.

Many intergenerational shared site programs develop when an existing program serving a single target audience (such as older adults or children) expands, and perhaps creates an additional new program component, or joins with another existing service provider to co-locate. Other intergenerational shared site programs are the result of two or more program components that coincidentally end up at the same location. In such cases, the intergenerational shared site program may not have been intentional, but nonetheless, someone with a vision realizes the potential and capitalizes on the inherent benefits of co-location. In other cases, an entirely new intergenerational program is created, with all new program components.

Program Components:

Most intergenerational shared site programs have two or three program components—and there are an infinite number of ways those components can be brought together. A 1995 study conducted by AARP found 281 intergenerational shared site programs. Of those programs, there were 72 different program models. Stated in another way, there were 72 different ways to combine program components. Obviously, the possibilities are endless.⁵ (See Appendix 1-2 for more information on the different models.)

You may have a detailed idea already in mind with a specific combination of programs and services; if so, then you will need to validate that idea and create a business plan to determine whether it is viable in relation to the needs and resources in your community. Or, you may have an existing program that serves older adults, and you would like to expand and create intergenerational synergy by adding a child/youth component (or vice-versa). Therefore, you will need to determine what the specific additional component should be.

The various program components in an intergenerational shared site program generally serve either older adults or children/youth, but there are cases in which the intergenerational shared site program intrinsically serves multiple generations. The program components may include:

- *Programs serving older adults*, including adult day services, nursing homes, senior centers, senior recreation programs, assisted living/residential care facilities, geriatric care units, continuing care retirement communities and senior housing facilities—or some combination of these.⁶
- *Programs serving children/youth*, including child care centers, early childhood programs, Head Start, before/after-school programs, schools (K-12, community colleges, universities, vocational/technical schools), youth recreational programs, camps, pediatric care units and child welfare agencies.⁷
- *Sites serving multiple generations*, including community centers, faith-based organizations (such as churches, synagogues, temples, mosques), hospitals, counseling services, family support centers, treatment programs, businesses with on-site family services (such as adult day services or child care) and housing facilities. These programs may include individual older adult or child/youth components as listed above as well.
- *Programs that provide services off-site*, but are housed at the intergenerational shared site program, such as home health agencies, chore services, mentoring programs, etc.
- *Businesses or services*, such as a gift shop, café, bakery or artisan's shop.

According to a 1998 AARP survey, the most common intergenerational shared site program models are:

1. Nursing Home with Child Care Center.
2. Adult Day Services with Child Care Center.
3. Adult Day Services Center with Multi-level Child Care (child care center and before/after school care.)



Photo by Anthony Cannon

4. Adult Day Services Center with Early Childhood Program.
5. Nursing Home with Multi-level Child Care.
6. Senior Center with Before/After School Care.
7. Senior Center with Early Childhood Program.⁸

These program components may give you ideas, but think creatively and try to imagine new ways to combine programs and services. Your assessment process may divulge needs and/or services that you had not considered. Intergenerational shared site programs are getting more creative, combining entrepreneurial skills with non-profit programs/services, businesses that can help support the non-profits, and special community services or activities.

RESOURCES

Presented below are excellent resources you can consult as you formulate your vision, conduct an assessment, engage in strategic planning, create your unique program model and/or validate your idea:

- *Action for Change*, at <http://www.actionforchange.org/mapping/>, provides a community mapping resource guide.
- *ASSERT (Aging Services Support for Evaluation and Research Training)*, at <http://www.feinberg.northwestern.edu/buehler-assert/>, is a project of the Buehler Center on Aging at Northwestern University. Its mission is to strengthen the ability of agencies to identify and meet needs for information; to help agencies build capacity for conducting, understanding and using research to improve programs; and to foster learning within agencies. ASSERT facilitates ongoing partnerships with local agencies serving any age group, and provides them with training, technical assistance and a variety of supportive resources.
- *The Center for Business Planning*, at <http://www.businessplans.org>, offers planning guidelines, sample business plans and other web resources.
- *The Internet Nonprofit Center*, at <http://www.nonprofits.org/npofaq/03/22.html>, provides information for and about non-profits, including a guide to strategic planning. The guide includes information on visioning, developing mission statements, goals, roles and responsibilities, timelines and business plans.
- *Northwest Regional Educational Laboratory* provides a downloadable *Mapping Community Assets Workbook* at http://www.nwrel.org/ruraled/publications/com_mapping.pdf.
- *Penn State Cooperative Extension Strategic Visioning Program*, at <http://visioning.aers.psu.edu/default.htm>, offers a number of programs and strategic planning tools, including *Charting the Future of Our Community* and *Choosing Our Direction*. This web site also offers Community Profile Information for Pennsylvania and New York.
- *Realizing Every Community Asset (RECA)*, at <http://www.tcfm.org/mapping/>, provides information about community mapping and includes “tests,” or

forms, that can be used to examine personal and community assets.

- *The Urban Institute* provides a listing of community mapping resources, technical assistance providers and data sources at <http://www.policylink.org/EDTK/Mapping/1>.
- *The U.S. Census Bureau* provides census and other survey data at www.census.gov.

CONCLUSION

As noted earlier in this chapter, strategic planning, developing a vision, assessing needs, developing a program model and dealing with the legal and accreditation ramifications of any given program model are all part of an ongoing program development process; these steps will be repeated over and over again throughout the program development process. This is to be expected and should not be seen as a failure or set-back. For example, if you have a certain program model in mind, but in the process of conducting a needs assessment, you determine the need for one part of your program model is already being adequately met, you may need to go back to the drawing board and find another program component that is a better fit. If that happens, the work you have done assessing needs and resources will help

you identify how to adjust your plan. Or, if you already have an intergenerational shared site program, you may find that you can add a new component, expand an existing one, create another site or refine your current efforts. The important thing is to be flexible, continuously re-examine your vision and goals, and keep moving forward! In the end, the visioning and assessment process will only strengthen your ability to deliver positive outcomes for children and older adults in your community.

- ¹ Goyer, A. (1998-1999). Intergenerational shared-site programs. *Generations*, 22(4), 79-80.
- ² Generations United. (2004). *Reaching across the ages: An action agenda to strengthen communities through intergenerational shared sites*. Washington, DC: Author.
- ³ Department of Health and Human Services. (1995). *Co-located intergenerational activities in Department of Health and Human Services' Programs*. (Office of the Inspector General, ADF-IM-92-12). Washington, DC.
- ⁴ Generations United. (2004).
- ⁵ AARP (1998). *Intergenerational shared site project: Final report*. Washington, DC: AARP.
- ⁶ Goyer, A. (1998). Intergenerational shared site project practitioner's guide: A study of co-located programs and services for children, youth and older adults. Washington, DC: AARP.
- ⁷ Ibid.
- ⁸ Ibid.

Appendix 1-1 Licensure and Accreditation Table

TYPE OF FACILITY OR SERVICE	# OF STATES WITH LICENSURE ¹	ACCREDITING ORGANIZATIONS	RELEVANT WEBSITES
OLDER ADULTS			
Nursing Home/Long Term Care	All states	JCAHO ² CMS COA	www.jcaho.org cms.hhs.gov www.coanet.org www.medicare.gov/NHCompare www.aarp.org/bulletin/longterm
Assisted Living	32 states & DC ³	JCAHO CMS CARF COA	www.jcaho.org cms.hhs.gov www.carf.org www.coanet.org www.carescout.com/ www.ncal.org www.aahsa.org
Adult Day Services	Common in many states	CARF (NADSA) COA	www.carf.org www.coanet.org www.nadsa.org
Continuing Care Retirement Community (CCRC)	Required to be individually licensed for each type of service they provide for which licensure is available	JCAHO CMS CARF-CCAC	www.jcaho.org cms.hhs.gov www.carf.org
Senior Centers		NISC	www.ncoa.org
CHILDREN			
Child Care	All states	NAEYC NECPA COA NAA	www.naeyc.org www.necpa.net www.coanet.org www.naaweb.org

State Specific Information can be found at <http://www.statelocalgov.net/> and <http://nrc.uchsc.edu/STATES/states.htm>.

KEY

Older Adult Services:

- CARF - Commission on Accreditation of Rehabilitation Facilities
- CCAC - Continuing Care Accreditation Commission
- COA - Council on Accreditation
- CMS - Centers for Medicare & Medicaid Services
- JCAHO - Joint Commission on Accreditation of Healthcare Organizations
- NADSA - National Adult Day Services Association
- NISC - National Senior Center Accreditation Program

Children's Services:

- COA - Council on Accreditation
- NAEYC - National Association for the Education of Young Children
- NECPA - National Early Childhood Program Accreditation
- NAA - National AfterSchool Association

¹ Contact your state department of aging or department of social services to learn more about the rules and licensing processes for your area.

² See key for explanation of abbreviations.

³ Mollica, R. (2002). *State Assisted Living Policy: 2002*. Portland, ME: National Academy for State Health Policy.

Appendix 1-2 Intergenerational Shared Site Program Models: Combinations of Older Adult and Child/Youth Programs

PROGRAMS Child/Youth Older Adults	Childcare Center % %	Before/ After School	Head Start Program	Early Childhood	School	Multi-Level Childcare	Youth Recreation	Pediatric
Adult Day Services	34* 38% ♦ (36%) ▼	8 9% (36%)	6 7% (36%)	27 30% (36%)	4 5% (36%)	29 33% (36%)	14 16% (45%)	5 6% (46%)
Assisted Living/Res. Care Facility	9 45% (9%)	1 5% (3%)	1 5% (7%)	6 30% (8%)	2 10% (10%)	6 30% (8%)	1 5% (3%)	2 10% (10%)
Continuing Care Retirement	4 44% (4%)	0 0% (0%)	1 11% (7%)	3 33% (4%)	0 0% (0%)	2 22% (3%)	0 0% (0%)	0 0% (0%)
Nursing Home	42 55% (43%)	1 1% (3%)	2 3% (14%)	17 22% (22%)	2 3% (10%)	24 32% (30%)	4 4% (10%)	6 8% (6%)
Senior Care	7 9% (7%)	24 32% (65%)	8 11% (57%)	22 29% (29%)	13 17% (62%)	17 22% (21%)	15 20% (48%)	0 0% (0%)
Senior Housing Facility	2 22% (2%)	1 11% (3%)	1 11% (7%)	1 11% (1%)	1 11% (5%)	2 22% (3%)	2 22% (7%)	2 11% (10%)
Multi Level Care	17 45% (18%)	1 3% (3%)	0 0% (0%)	9 24% (12%)	0 0% (0%)	16 42% (20%)	0 0% (0%)	0 0% (0%)
Senior Recreation	3 12% (3%)	11 42% (30%)	1 4% (7%)	12 46% (16%)	3 12% (14%)	3 12% (4%)	10 39% (32%)	0 0% (0%)
Geriatric Care Unit	9 53% (9%)	0 0% (0%)	0 0% (0%)	4 23% (5%)	0 0% (0%)	7 41% (9%)	0 0% (0%)	1 12% (20%)

NOTES

* The top number in each cell is the total number of that particular program model in the sample.

♦ Upper percentages are the proportion of the older adult individual program type that are co-located with that child/youth individual program type.

▼ Lower percentages in parentheses are the proportion of the child/youth individual program components that are co-located with each of the older adult individual program components.

Reference: AARP. (1998). *Intergenerational Shared Site Project: Final Report*. Washington, DC: Author.

Chapter Two Funding and Partners

By Donna M. Butts

INTRODUCTION

Intergenerational shared sites offer tremendous opportunities for people of all ages and for the communities in which they operate. They provide supports to families as they address dependent care needs across the age span. They help young and old feel connected and fulfilled as they contribute to another generation. And they make sense to donors who want to invest their resources to better meet the needs of multiple generations rather than a single, age-segregated group.

Volumes have been written about fundraising, and excellent resources are available. This chapter will provide an overview of the guiding principles of fundraising; the characteristics of today's donor; the importance of revenue diversity; maximizing a Board, Fundraising or Campaign Committee; identifying potential funding sources; undertaking a capital campaign; receiving donated property; and maximizing available resources. Appendix 2-1 provides a list of potential federal funding sources and government reimbursement programs.

GUIDING PRINCIPLES

Fundraising involves planning and partnerships. It is about people, passion and potential. The donors, clients, agency and broader community all benefit from philanthropic contributions that are well-conceived. When raising funds you should:

- Know what the funds are needed for and the “face” they will serve. Focus on the results of the program, not the organization's needs.
- Know what your total budget is and what you need from a potential funder. “Lots” is not an option.
- Have a clear goal for your program or project that is outcome-based, along with a small number of measurable objectives and a detailed work plan with a timeline.
- Know your unique strengths and organizational capabilities. Avoid talking negatively about your perceived competition.
- Research and know what the potential funder cares about, the language they use and how your program will help them fulfill their mission or passion.

WHO GIVES?

This is a generous country. In 2003, charitable giving in the United States totaled nearly 241 billion dollars.¹ While most fund-seekers focus on government or foundation sources, more than 80% of these dollars were contributed by individuals, living or through estate bequests. And it's not just wealthy individuals that are giving. Households with annual earnings of \$100,000 or less provided 40% of charitable contributions in 2003.² An intergenerational shared site can be very appealing to someone who wants to honor someone or leave behind a permanent demonstration of commitment to a community. Whether contributing enough to name a room, an elevator or an entire building, these gifts can be fundamental to the success of your program.

Fundraising is really about connecting with people. Whether an individual or institutional prospect, most successful requests are made by sources with which you have an existing relationship. When polled, funders indicated the vast majority of them had previous personal contact with grantees. What does this mean? Think of fundraising as developing relationships. They take time, care and commitment.

THE IMPORTANCE OF REVENUE DIVERSITY

Diversity leads to stability. Think of a stool. It takes several legs to keep one stable; similarly, your inter-

Photo by Romy Calvo





Photo by Susan Forte

generational shared site needs multiple sources of funding to ensure its continued viability. Becoming too dependent on one funding stream or leg is sure to cause problems. For example, dependency on grants leads to the ever-constant research and write cycle. As soon as a grant is awarded, the cycle starts all over again. In another case, relying too heavily on individual donations can lead to problems if there is a shift in the economy or donors become leery because of a non-profit scandal. In the world of funding, variety will make you stronger. Your fundraising mix will also change depending on whether you are beginning a Capital Campaign to raise money to build a facility or securing on-going support for intergenerational programming at a shared site already in operation. Diversification will enhance your chances for long-term success.

The following are brief descriptions of common sources of funds that can be mixed to develop the right composition for your funding stool.

Individuals:

As stated earlier, individuals contribute the most money. However, even the most dedicated programmers sometimes stop short of asking. Fear of rejection, concern the potential donor doesn't have enough money and

worry that the request will lead to a quid pro quo are a few of the reasons people cite for not wanting to bother people. The truth is, though, that behind every funding source is an individual. The most successful fund raisers are the most successful at building relationships and partnerships with people. Listen and learn what resonates with a funder. You can help them make their vision, if it is a shared vision, a reality. Invite them to your program or take participants to meet them.

Foundations:

There are three words to guide your efforts with foundations: Look locally first. While it's not unusual to think Ford, Kresge, Rockefeller, Mott or Kellogg, in fact, many foundations exist in your backyard or at least your state. They are more accessible to you and more likely to fund local initiatives. Community and family foundations are growing in numbers. These are perfect candidates for intergenerational programs that can make a case for serving children, youth and older adults. Read local newspapers, visit your regional Foundation Center library or search the web to do research. An excellent resource for exploring potential local, state and national foundations is the Foundation Center On-Line Directory at www.fdncenter.org. Through this resource, you can find basic information free-of-charge about over 70,000 private and community foundations in the United States. For a monthly subscriber's fee, you can access in-depth information about a foundation's giving history and grant-making guidelines.

Government:

Government grants or cooperative agreements can be great sources of support for new endeavors. Keep in mind, though, that there are often matching fund requirements that can be difficult for a smaller organization to obtain. The reporting requirements and oversight issues also need to be considered. Spend time on the web looking at government agency websites and bookmark funding alert keys. Sign up for e-mail notification of federal announcements at www.grants.gov. Federal agencies release Requests for Proposals (RFPs) or Applications (RFAs) through the Federal Register. When reviewing an announcement, look first at the due date, amount to be distributed, number of grants to be given and eligibility requirements before going any further. A list of potential federal funding sources can be found in Appendix 2-1.

Corporate Sources:

Corporations have several potential areas for partnership. Depending on their size, many have separate foundations, marketing departments and corporate contributions staff. Their funding will be aligned with the priorities of the corporation, so be sure to check out annual reports, press releases and other organization's funding lists on which they appear. Your board or campaign committee should include corporate representatives who can access funds from their company and appeal to peers at other companies to do the same. When making an initial request for funds, remember: if you can't say it in one page, it probably won't be read. Be aware that many corporations support employee groups that are looking for volunteer opportunities. Cultivating volunteer support among a corporation's employees is an excellent way to develop a long-term relationship with that corporation which, in turn, may increase the potential for ongoing financial support.

Fee for Service and Related Business Income:

An additional income-generating opportunity for intergenerational shared site programs is to charge fees for services. Many intergenerational shared site programs charge fees, often on a sliding scale based upon the participant's ability to pay. Fee for service funding helps to support on-going expenses once the facility is constructed and the program is established. These funds are usually not enough to sustain the program and most still need supplemental funding sources.

Some programs have also successfully operated related businesses that generate income. Ways of generating profit need to be carefully considered to ensure that it is connected to the organization's mission; if not, you may need to pay Unrelated Business Income Tax (UBIT). A good example of an intergenerational site that earns income related to its mission is ONEgeneration in California. They run a farmers market on site that involves older farmers from the area. Students in need of community service hours volunteer and help. This creates a dual advantage as the public comes in contact with ONE's programs, while the farmers and ONE earn income.

Reimbursement for Services:

The services offered by an intergenerational shared site may be eligible for reimbursement through local, state or federal sources. These include sources that support child care, elder care, meal programs, respite services

and other social services provision. A list of possible reimbursement programs to consider is presented in Appendix 2-1.

Bequests and Tributes:

Bequests, memorial giving and tributes do not have to be complicated or require a planned giving office to implement. For instance, the South Dakota 4-H Foundation had a great campaign that simply reminded supporters who received their newsletter to "Add Another Paragraph" when making out a Will and include 4-H as one of their beneficiaries. A simple printed envelope that is available at functions can remind people that they can give a gift to your program in memory or as a tribute to someone's accomplishment, such as graduation, promotion or marriage. Bequests and tributes become much more critical in a capital campaign, which may depend heavily on these types of "legacy" commitments.

Special Events:

The bottom line with special events is that they are time consuming, seldom relate to an organization's mission and usually generate little income after expense. So why do them? Visibility. If a higher profile is your goal, a special event can work for you.

MAXIMIZING A BOARD, FUNDRAISING OR CAMPAIGN COMMITTEE

Committed volunteers are essential to successful fundraising for intergenerational shared sites. They can provide access to other donors of all types. By making a personal contribution, an individual is poised to ask peers for equal gifts. Some people will volunteer to do anything but fundraising. While they may not be comfortable "making the ask," they can still help with opening doors by helping to schedule appointments with people they know or by hosting events at a home or office. During these gatherings, invited guests learn about the shared site project and plans for the future. They may be asked to contribute while at the gathering or staff may follow up at a later time.

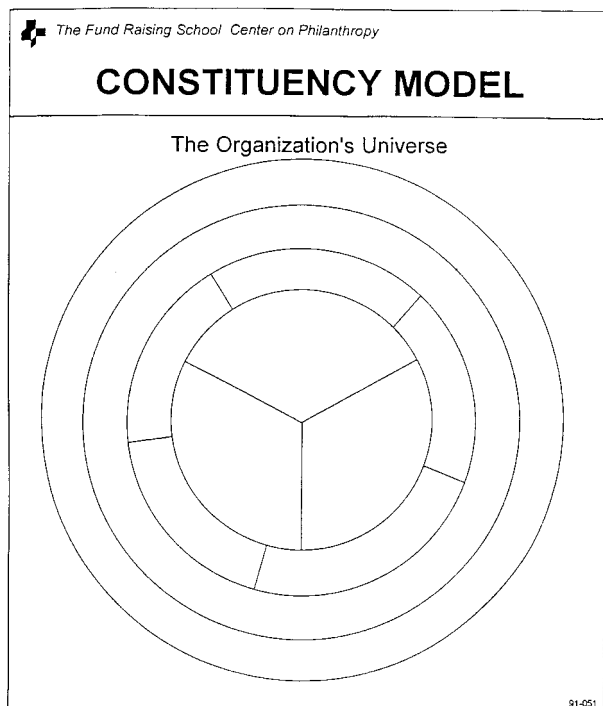
IDENTIFYING POTENTIAL FUNDING SOURCES

How do you begin narrowing down the vast universe of prospect so you know who to approach first? A Constituency Circle can be used with your staff, board

and committees to help you decide. Developed by Indiana University's Center on Philanthropy, the circle is really a simple tool used for brainstorming sources (see Figures 2-1 and 2-2). Think about a pond. When you throw a stone in the middle, the ripples span out until they disappear. They are strongest near where the stone (your mission) entered the water (your funding prospects). The prospects closest are most likely to give, while those further away will be less likely to contribute and will take more time to cultivate.

Once you identify primary sources, start mapping names until you get to an action step such as: *Susan will call her personal trainer, Sandra, whose brother is Richard, whose wife is head of the XYZ Foundation and request an appointment.* Remember . . . six degrees of separation. We all know someone who knows someone.

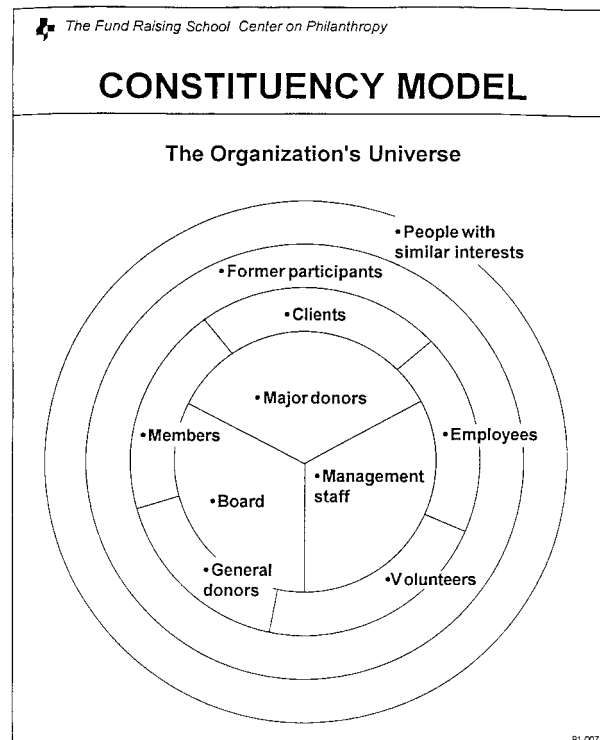
Figure 2-1: The Constituency Model



UNDERTAKING A CAPITAL CAMPAIGN

Capital Campaigns are intense, time-limited efforts designed to increase assets for the purpose of construction, renovation and/or establishing an endowment. Planned and major gifts, often committed over a period of years, combine with smaller gifts to reach the multi-million dollar goals that are generally a part of the campaign. Key to a successful campaign is a volunteer structure led

Figure 2-2: A Sample Constituency Model



by a well-connected individual with personal wealth, all of whom can ask others to contribute at the level they personally have committed. Challenge or matching gifts are helpful. For example, the Kresge Foundation, the largest “bricks and mortar” foundation in the country, will give a challenge grant to help a campaign to meet its goal. It requires the grantee to find additional funds to match their contribution. Many donors like the idea of their funds increasing as they give to leverage other dollars.

Much of the work of a capital campaign takes place before it ever becomes public. Before beginning, it is wise to work with someone, most likely a consultant, who has capital campaign experience. The planning and feasibility stage of the campaign is important. You will need to develop the following basic information to begin:

- A case statement that lays out the rationale for why the building or endowment is needed and how it will benefit the young, old and the community.
- Architectural plans for at least the front of the building and floor plans.
- A construction budget based on a contractor's bid.

- A fundraising plan for the campaign that includes how much has been raised to date and where you anticipate raising the remaining funds.
- Budget and financial plan for operating the program once the building is renovated or completed.

Donor recognition is an important part of any fundraising effort. This recognition can run the gamut from sending a thank you letter in a timely manner to naming a wing or building after a major contributor. A well-thought-out recognition plan will include gift levels, with larger donors receiving increased recognition.

RECEIVING DONATED PROPERTY

It is possible to secure donated property or a long-term, low cost lease (for example, 99 years at one dollar per year); however, these need to be fully investigated before entering into an agreement. The intent of the donor, whether an individual or government agency, may be altruistic or there may be caveats that need to be explored in advance. For example, do the zoning requirements allow for the type of program or facility you envision? Is it on or near a wetland or former toxic waste dump? If a building exists, will it cost more to renovate than build from the ground up? Is the donor offering additional support or demanding cumbersome requirements? Review potential donations carefully and, preferably, with outside expert counsel.

MAXIMIZING AVAILABLE RESOURCES

There are many resources available through the internet. A search can bring you information on conducting capital campaigns, identifying funding sources, researching potential individual supporters and much more. Below are a few sites to begin your exploration. Some offer fundraising tips, while others provide information about funding sources. Several offer courses for continued study.

- The Foundation Center at www.fdncenter.org
- The Grantsmanship Center at www.tgci.com
- Association of Fund Raising Professionals at www.afpnet.org
- Indiana University's Center on Philanthropy at www.philanthropy.iupui.edu



Photo by Lynn Vidulich

- The Kresge Foundation at www.kresge.org
- Donor recognition ideas can be found at www.donorart.com or www.donorwall.com
- The Council on Foundations, which can help you locate community foundations in your state, can be accessed at www.cof.org/locator

Publications about fundraising and specific areas of fundraising abound. In addition to the resources listed above, many books and tools can be found at www.wiley.com. *The Chronicle of Philanthropy* is a biweekly publication with helpful information about trends, funding sources and resources and can be found at www.philanthropy.com. Grant Makers in Aging produced *A Toolkit for Funding Across the Ages* which can be found at www.gu.org.

A good resource for more information on the financial considerations for developing an intergenerational shared site is the report by the National Economic

Development and Law Center (NEDLC), *Financial Analysis & Considerations for Replication of the ONEgeneration (ONE) Intergenerational Daycare Program*. NEDLC was asked by the Orfalea Family Foundation to conduct a financial study of ONEgeneration's Intergenerational Daycare Program to determine the considerations for replication of this model for others. The final report is available at www.gu.org.

- ¹ American Association of Fundraising Counsel. Retrieved June 21, 2004, from www.aafrc.org/press_releases/.
- ² Association of Fundraising Professionals. Retrieved May 17, 2004, from www.afp.net/resources.

CONCLUSION

Intergenerational shared sites have tremendous potential in the funding world. They allow a funder to invest in more than one population, meet important community needs and better use limited resources. Fundraising for these programs needs to be carefully thought out and involve staff and volunteers in order to be successful.



Photo by Marilyn Probe

Appendix 2-1 Potential Federal Funding Sources

The following federal funding streams include, or could include, intergenerational shared site support:

- *Older Americans Act*, administered by the Department for Health and Human Services (DHHS), Administration on Aging (AoA), provides grants to the states to promote a continuum of care for the elderly, including the development of multipurpose senior centers (Section 311). There are about 6,000 centers in the country with no data available on the number that offer intergenerational programming. Other provisions of the Act that promote shared sites and resources include Nutrition Services/Meals Programs (Section 339); Training, Research, and Discretionary Project and Programs (Section 415); National Family Caregiver Support Act (Title III) and Community Service and Employment (Section 502).
- *Head Start*, administered by DHHS Administration for Children and Families (ACF), is a child development program for low-income children. It provides nutritious meals, medical and dental care, and other services. Funds allow grantees to acquire facilities that could be used as intergenerational shared sites. Several Head Start programs are intergenerational; however, data does not exist on how many of the 13,000 centers nationwide operate as shared sites.
- *21st Century Community Learning Centers* (Title IV Part B of No Child Left Behind Elementary and Secondary Education Act) gives funding to states to provide grants to local schools and community-based organizations for after-school programs and to provide life-long learning opportunities for community members.
- *Community Development Block Grants*, administered by the Department of Housing and Urban Development (HUD), are available to local governments in entitlement communities and may be used to improve community facilities and services. Funds are available for building public facilities and improvements such as senior, recreation and community centers and for providing public services such as day care, transportation and youth services.
- *Hope VI* is a HUD program designed to help eradicate severely distressed public housing. It includes the opportunity to provide community and supportive service programs for residents.
- *Section 8* is a voucher program through HUD that provides tenant-based assistance to income-eligible households. Local public housing authorities distribute vouchers to qualified tenants, who then conduct their own housing searches.
- *American Dream Down Payment Bill* of 2003 included the Legacy Intergenerational Housing Act that provides funding for demonstration programs developing housing for grandparents and other relatives raising children.
- *Section 202* is a major HUD funding source for non-profit sponsors working to build subsidized rental housing for the elderly.
- *Neighborhood Networks* is a community-based HUD initiative designed to establish multi-service community technology centers for residents of insured and assisted housing through innovative private/public partnerships. There are more than 800 Neighborhood Networks centers operating in HUD multi-family housing properties throughout the United States.
- *Individuals with Disabilities Education Act*, administered by the Department of Education, supports early childhood programs that serve children with special needs ages three to five through the Preschool Grants Program, as well as infants and toddlers through its Grants to Infants and Families.
- *Community Services Block Grant Program*, administered by DHHS's Office of Community Services, provides assistance, such as education, health and housing, for low-income people. Training and technical assistance are available.

- *Title XX Social Services Block Grant*, administered by ACF provides, among other priorities, funding for child day care and adult day care. Currently, there is no provision that encourages intergenerational shared sites and services.
- *Child Care and Development Block Grant*, administered by ACF, provides grants to states to increase the availability, affordability and quality of childcare.
- *Corporation for National and Community Service* administers Learn and Serve America, AmeriCorps and Senior Corps Programs. Foster Grandparents and Retired and Senior Volunteer Programs engage older volunteers in direct service to children and/or their communities.
- *The Child and Adult Care Food Program*, created in 1968 to provide reimbursement for meals and snacks served in before- and after-school programs, childcare centers, Head Start centers and adult day care centers.
- *Medicaid*, the largest funding source for home and community-based long-term care. Reimbursements are available for Medicaid-certified facilities and a waiver program exists.
- *Medicare*, the nation's largest health insurance program, covers people over the age of 65 or disabled persons. Reimbursement is provided to Medicare-certified facilities for services such as skilled nursing home care, outpatient services and other health services and supplies. A waiver program exists.
- *The Centers for Mental Health Services* may provide reimbursements for mental health services offered through intergenerational shared sites.

Intergenerational shared site programs may also be eligible for government reimbursements. Program administrators who have worked with a single age group may not be familiar with the supports available for all the generations they seek to serve. Some possible reimbursement sources include:

Chapter Three Facility Design & Building

By Dyke R. Turner

INTRODUCTION

A former professor of mine proclaimed that if you calculated the number of individual decisions affecting quality in the planning, design and construction process that are required from all the various players, your typical building project would average somewhere in the neighborhood of 300 to 400 decisions per square foot, from inception to occupancy. According to her, this would mean approximately four million decisions would be needed to develop a building large enough to house a modest child care center for 100 children. While beginning any building project can be daunting, the implementation of a methodical approach can result in a rewarding process and end product. Given the special and complex needs of accommodating children and the elderly in a shared site setting, it is critical that one begins with three basic building blocks: a good understanding of the planning, design and construction processes; the assembly of a qualified team; and access to adequate resources. This chapter provides information to begin that journey, covering the basics steps, roles and information processes that are critical, or may not be easily found elsewhere.

While the growing body of information on the design of intergenerational facilities is of great use, it is still in its infancy. Thus, it may be necessary to synthesize information from both elder care and child care models separately. Keep in mind, however, that the majority of intergenerational program information and intended outcomes specific to your particular project must ultimately originate from research done by you, the end user. The roles of the Architect and builder (Contractor) are to help translate your specific program information into bricks and mortar. This guide was written for those with limited experience in these planning, design and construction processes, but will hopefully provide useful insight for others, as well. The terms “child care” and “elder care,” are used for convenience, but the interpretation should be extended across the entire spectrum of intergenerational possibilities.

OVERVIEW OF THE BUILDING PROJECT PROCESS AND THE KEY PLAYERS

While every project is unique, with tailored goals, requirements and solutions, exploring what others have done before you can be extremely helpful. Investing time and energy in discussions with other professionals working in the field and making trips to similar facilities can be quick ways to gather useful information. Be careful, however, to avoid falling into the trap of applying solutions from other projects which may not be appropriate in your specific situation. Research and site visits should be used as dissection tools, not only to gather creative solutions to transpose, but to also explore the programmatic questions that led to these solutions. From this, you can best determine relevance to your project.

Appendix 3-1 depicts a linear summary of the six main phases in the building project process: 1). Feasibility and Needs Assessment; 2). Programming; 3). Design; 4). Construction; 5). Occupancy; and 6). Post Occupancy. Please note that this linear depiction may be a bit misleading, since the process is really quite reiterative. The design intent is based on a specific definition of functional needs, but new emerging solutions often open up previously unrealized functional

Photo by Joan Lawrence



needs and opportunities. You will find that the linear nature of the process is really driven to a large degree by financial resources, i.e., how long can you afford to redesign? (Please refer to Appendix 3-6, *Hypothetical Project Schedule*.) But there are systems that have evolved within the industry which offer a compromised phased approach that works. These are described later under “Design.”

Before the specific building project processes are described, it is important to understand who the key players are in the building process. The traditional design/construction team consists of three primary players: the Owner (you), the Architect and the Contractor (the builder). There is generally a contractual agreement between the Owner and the Architect, and during construction, a separate agreement between the Owner and the Contractor. Typically, there is no direct contractual arrangement between the Architect and the Contractor. This puts the Owner, appropriately, at the center of the project. The importance of understanding precisely everyone’s roles and expectations, as well as having a clear picture of how these roles fit into the schedule of events, cannot be emphasized enough. A large number of potential problems are rooted here, so be prepared to put some energy into this part of the project.

The primary responsibilities of the Owner are to carefully define the program needs of the project (see section on “Programming” below); critique and approve a series of evolving design solutions; approve a single final design solution; and provide the property and financial resources for the project.

The responsibilities of the Architect are to synthesize the Owner’s program information into a series of evolving designs (see section on “Design” below); coordinate required consultant services (mechanical, electrical, plumbing, structural engineering, and sometimes additional consultants such as functional programming, interior design, landscaping, etc.); develop construction contract documents; assist the Owner in getting cost bids for construction and in evaluating contractors; and help coordinate and interpret the project intent during construction.

The responsibilities of the Contractor are to build the project as defined by the architectural construction documents, within the cost and the time limits of their contract with the Owner. The Contractor, in turn,

enters into subcontract agreements with various trades and suppliers who actually construct the building. This provides the Owner a single point of responsibility for completion of the work.

There are a host of other players, as well, that can be either contracted directly with the Owner or contracted through the Architect, depending of the specific needs of the project. These include interior designers who can offer special expertise in furniture and material selections, as well as space design and purchasing services; functional programmers who can help define and translate your project needs (see section on “Programming” below); landscape architects; fire protection engineers; kitchen designers, etc. Your Architect is probably the best person to advise if any of these are recommended. State and City agencies will play a large role, as well (see section on “The Place of Regulations” below).

The most successful projects are the result of a committed team effort by the Owner, Architect and Contractor. It is critical that all team members commit to the following: 1). All parties must have a clear understanding of the contract documents and responsibilities. 2). They must keep communication lines continually open, quickly respond to clarifications needed and address head-on all issues that arise. 3). They must understand that, regardless of the care taken by all parties, some mistakes, misinterpretations and unanticipated conditions are likely to occur; these must be anticipated as part of the process.

Most architectural services typically available to the Owner are outlined in AIA Document B-163, *Standard Form of Agreement between Owner and Architect for Designated Services*. Owner, Architect and Contractor responsibilities are described well in AIA Document A-201, *General Conditions of the Contract for Construction*. These can be obtained through the local office of the American Institute of Architects (national contact information: 1735 New York Ave., NW, Washington, DC 20006-5292, (800) 242-3837, infocentral@aia.org, www.AIA.org).

Phase 1—Feasibility Studies and Needs Assessments:

Regardless of how committed you are to your mission, it is critical to your project’s success to accurately

determine how you can afford to keep the doors open. Who will the project be serving (how many, what ages, what special needs)? Where will they come from, and who in the area might be competing with you? What's your budget (planning, construction and operational)? These should all be determined very early in the process. There are consultants that can assist you with demographic studies, needs assessments, a business plan/*pro forma* development, competition analysis, financing, and other preliminary needs studies.

(*Chapter 2: Funding and Partners* provides additional information on these issues.) Organizations like the Area Agency on Aging, child care resources, the Department of Social Services and the Department of Health and Human Services may be able to provide valuable information on demographics and needs. It is important to rationally plan your project, anticipating potential problems. The concept of "Build it, and they will come" occurs far too frequently and is a very risky approach. At the same time, be sure not to let the financial and business burdens stifle your enthusiasm and energy for exploring creative solutions.

Site selection may take place as part of the feasibility study or the Programming Phase, or may be a phase unto itself. (See Appendix 3-5, *Architectural Programming*.)

Phase 2—Programming:

The Programming Phase is at the very heart of the success of any project, and is the most important part of the design process. Unfortunately, it is also the phase that is most often ignored. The classic definition of programming in the architectural field is "problem seeking."¹ Its purpose is to develop a Program Document that defines, in detail, the goals of the project and the "problem" that the design solution must satisfy. It results in a body of information and a statement of needs that the architect/designer will use to develop the final design solution. It must, at a minimum, address all the important functional elements (e.g., required spaces, equipment, activities) that should be included in your project, how these elements interrelate, how they will be used by the occupants, and how occupants themselves relate to one another. (See Appendix 3-5, *Architectural Programming*.)

Equally important, the Program Document forms a living tool that can be used throughout the project to verify that important goals and objectives are being met

and that small details are not forgotten. The document should be continually updated to reflect changes, record decisions and new information discovered, and further define the details of the project. The Program Document later becomes a historical record of the intent of the project, containing all the base data, and a clear explanation of how elements of the facility were meant to be used. It remains a valuable, historic tool for those who use the facility in the future.

It is important to understand that every decision made along the way impacts both the final cost of the project and the project's end quality. The earlier the functional needs of the project can be determined, the better the design team can begin to test solutions, and the better chance of a successful end design. Needless redesign wastes limited financial resources, and making changes once actual construction begins is often financially impossible.

Programming for intergenerational shared site projects will involve a good deal of research into intergenerational best practices. Because these projects are relatively new, the responsibility to provide accurate information on your actual program needs will fall primarily on you, regardless of how hard your Architect works in your interest. If you do not have direct experience in the field with a similar program, you will need to link with organizations like Generations United for intergenerational programming and design assistance. It is advisable to assign one person from your organization that can coordinate the development of the Program Document and can continue as the main contact during the design and construction phases. If possible, this person should have some intergenerational experience. It may be of benefit if this person later serves a lead role within the shared-site program once it is open (e.g., Program Supervisor, Activities Coordinator, Intergenerational Coordinator, or Director), but this will depend upon specific circumstances, as skills for these roles are quite different. Maintaining continuity of the project and ownership of the programming is critical.

You may need assistance in developing the Program Document. Some architectural firms offer programming as a specific service, and there are a few firms that specialize just in programming. It is to your advantage to find an architectural programmer with experience in intergenerational facilities; however, that may be difficult as this is currently a narrow field. Your other



Photo by Cleone Mocik

option is to look to a firm with experience in either designing for elders or designing for children, which will be much easier to find; this will provide some common ground from which to begin. (Selecting an Architect is discussed in more detail later.) You might also take a team approach to programming by involving someone outside of the architectural field with strong intergenerational operational experience. This team may be able to work with you and an architectural programmer to build this document.

Phase 3—Design:

As mentioned earlier, the architectural design process is one of revisiting and refining the solutions. A troublesome problem faced by a new and open-ended field like an intergenerational shared site project is that the process is more difficult to finalize than it is in more defined building types. However, as intergenerational design evolves, the building type will become more common and information will become more available, helping the process become more streamlined.

New solutions for this building type, and in some manner for all building types, tend to lead to new questions. Traditional systems within the industry are in a position to help you meet your program goals. Typically, your Architect will complete the design process in three progressive phases, based on the information contained in the Program Document and additional input from you, the Owner. These phases are listed below and are generic in nature, whether or not the project is intergenerational. Each phase must be formally approved by the Owner before proceeding to

the next phase. Returning to an earlier phase could result in additional costs and delays. But proceeding with a compromised design may be even more costly in the long run, and for this reason, it is extremely important to the success of your project to invest as much time, energy and commitment up-front as possible.

1). Schematic Design PHASE: The Program Document, developed earlier, acts as an informational platform upon which the building design begins. With the Owner and the Architect working closely together, basic relationships of spaces and functions are defined. These relationships are clearly developed in a series of rough sketches and simple models. Numerous versions may be developed before arriving at an acceptable solution, but through this process the overall scope of the project is shaped.

A basic list of materials, finishes and equipment is also developed from the programming phase to help define the project's level of quality. All changes in initial assumptions and all new project details should be recorded in the Program Document (usually this will be the Owner's responsibility) so that the Program Document and the design evolve together to define the current project solution. At this point, a rough cost estimate can be developed to verify that the project is still meeting the defined budget criteria, and adjustments can be made at this time. The accepted schematic design solution should be formally documented by the Architect and formally approved by the Owner before moving to the next phase.

2). Design Development PHASE: This phase is yet a further refinement of the schematic design phase and will result in detailed floor plans, section cuts through building elements, and well-defined outline specifications identifying materials, finishes and equipment to be incorporated into the new building. By the end of this phase, nearly all decisions regarding the building design should have been made and discussed with the Architect. You will now know what your building design looks like inside and out, and will be able to visualize day-to-day operations in fine detail. Again, the Program Document should be updated to reflect the design, cost estimates prepared, and formal approval given to the Architect.

3). Construction Documents PHASE: In this phase the completed design is put into a form that can be used to determine more accurate construction costs for the project and then to construct the final building project. The construction documents consist of two major elements: Construction Drawings and detailed Specifications. These elements will be incorporated into your contract with the Contractor.

The design process continues into this phase, but less intensively from the Owner's point of view, primarily in refining details and further defining finishes and equipment. The documents are often laid out in a series of completion stages (e.g., 50%, 90% and 100%) to further aid the Owner in the review process. You should again update your Program Document and spend a significant amount of time testing how your day-to-day operations will take place down to the smallest detail. If you discover at this point that for some reason a critical element has been left out, or a better solution emerges, you will need to weigh the long-term benefits of making a change against the cost of returning to an earlier phase. Opportunities for making wholesale concept changes without impacting cost and schedule have passed, but changes are not impossible. All efforts should be made to rectify any missing elements in the project. Rely on your team and the strength of your programming efforts to reassure yourself of your decisions. Don't be intimidated solely by cost considerations into accepting a design, even at this phase, if it fails to meet your team's or your overall goals. At the end of this phase, formal approval constitutes acceptance of the estimated cost and agreement that the project is ready to be built.

Before the next phase, Construction, can begin, bids must be secured for the project. Bidding the project to determine the actual cost of construction (compared to "cost estimating," which was done in the earlier phases of the project) can be broken into two main types: competitive bid or negotiated bid. It is likely that your best price will result from a competitive bid. Unless you are involved in a public project that requires open bidding, the best approach to a competitive bid is to limit the number of bidders and pre-qualify them. (See section on "Selecting the Contractor," below). A negotiated contract, where the cost is non-competitively agreed upon, will likely be higher in price, but can sometimes result in a better overall value if the General

Contractor competitively bids subcontracts and works with the Architect and you to "value engineer" the project. Value engineering, a process of carefully evaluating cost benefits of alternate design components to help decrease the cost of construction, can also sometimes be used to help study the cost benefits of different systems over the life of the building (e.g., initial costs vs. long-term energy costs).

If bid costs are higher than the target budget for the agreed upon project, it is the Architect's responsibility (at the request of the Owner) to make modifications to the contract documents to bring the project into budget as closely as possible. Every project has three interrelated attributes that may be adjusted: 1). Scope of the work (i.e., the size or complexity of the project); 2). Quality (level of finishes and complexity of systems); and 3). Cost. You cannot reduce cost without also affecting scope, quality and sometimes time.

Even though budgets may be tight, maintaining reasonable financial contingencies for the inevitable unforeseen issues is an absolute must. Contingencies should be included in cost estimates at all design phases of the project. Do not eliminate contingencies to bring a project into budget. If the project approaches completion unscathed, there will be plenty of opportunities to incorporate these dollars back into the end quality of the project.

Phase 4—Construction:

During the Construction phase, the Contractor builds the project per the construction contract for the cost agreed upon and within the time stipulated. The Architect interprets and clarifies the construction documents and serves as an instrumental link between you, the Owner, and the Contractor. During construction, your responsibility as Owner is to follow the progress of the project closely, respond to questions posed, review with the Architect the final submittals on products and materials to be incorporated into the project, and of course, pay the bills.

There are a host of legal relationships and responsibilities (for all parties) that should be incorporated into your construction contract. The standard contract documents published by the American Institute of Architects (see "Finding an Architect" below) cover the majority of these, are of high quality and are accepted by nearly everyone involved with your project. Your

Architect will help tailor these contracts to meet the specific needs of the project.

Phase 5—Occupancy:

When scheduling your opening date, it's advisable to allow a time contingency in the (likely) event there are delays during construction. There are ways to contractually protect the Owner from unwarranted delays, but there are also a host of delays that cannot be anticipated (e.g., weather, soil conditions, discovery of hazardous materials); this is particularly true in renovation projects. You will also want to carefully orchestrate the completion of the project around your program needs. For example, it may be critical to recruit for the children's program in time for the beginning of the school year, or there may be a window of opportunity for negotiating a contract with your Area Agency on Aging or Veterans Administration. There may also be special considerations regarding the way you want to sequence opening the various components of the intergenerational program.

Be sure that movable furniture and equipment (typically not included in the construction contract) are scheduled

to arrive in time for the opening. The setup process of your new facility, classrooms and intergenerational activity areas will take a significant amount of time and can be outlined and discussed with the Architect in the programming phase of the project. Be sure that you have continually communicated with your program licensor(s) regarding both the development of your design solution and the schedule, as not to delay any required approvals.

Phase 6—Post Occupancy:

After you have been open for perhaps three to six months, you should consider bringing together the original design team and the current users to evaluate how well the building is working. The Program Document that you so diligently updated during the design process will be an invaluable resource in this process. This Post Occupancy Evaluation process offers the end users a much better understanding of the original design intent, some of which may be forgotten over time. It also allows an opportunity for a detailed evaluation of the original design solution, which can be documented for future programs. Once you've collected this kind of information, you can then make an informed decision on whether implementing the original intent will improve the overall use of program space, if it requires a new operational solution, or even if some architectural changes might be made. It's beneficial to repeat the Post Occupancy Evaluation process every several years, either informally or using consultants to assist.

THE PLACE OF REGULATIONS

Building code and agency review requirements vary widely from state to state and among local jurisdictions. Thus, while generalities will be addressed here, it is important that you verify specific applicable regulations in your area. You may find that some codes are in direct conflict with one another when addressing child care and elder care facilities, or that compliance may make it difficult to provide an environment conducive to fostering intergenerational relationships. Codes typically do not address intergenerational uses, and providing both functionality and compliance may require careful negotiations with code officials.

Typical codes requiring compliance include local building codes, state building codes, health department regulations (city, county and/or state), construction and operational requirements imposed as part of state

Photo by Lynn Vidulich



licensing requirements, and zoning review (city and sometimes county). Mechanical, plumbing, electrical, fire codes, etc. are usually referenced in the building codes and incorporated in the permitting process. In addition, there may be specific community design review board requirements.

If your project is to be in a licensed healthcare facility, there may be other overlay reviews needed by accrediting organizations such as JCAHO (the Joint Commission on Accreditation of Healthcare Organizations), NAEYC (the National Association for the Education of Young Children) for child care centers, and CARF (Commission on Accreditation of Rehabilitation Facilities) for adult day services. These accrediting organizations all have specific environmental requirements. In some cases, you may also need to look into contractual arrangements required as part of the certification process for Medicaid reimbursement. Likewise, Veterans Administration and Area Agency on Aging contracts may also have “physical plant” related specifications that need to be taken into consideration as part of the design process. Additional requirements may be imposed by funding sources, such as the Department of Housing and Urban Development; federal projects carry their own regulation burden. While building and zoning codes are usually well-articulated with marginal room for interpretation, other similar licensing-related regulations for children and elders (such as those of local and state health departments and your state’s Department of Social Services or Department of Health and Human Services agency) are sometimes subject to wide interpretation. An architect with experience and a working relationship with these specific agencies in your area will help assure a much smoother project. You may also benefit from the experiences of operators of similarly licensed facilities in your area.

Many people believe there is an aura of confrontation around permitting and licensing. If approached appropriately, this is generally not warranted. The people working within these agencies can be incredible informational resources for you. A meeting between licensing personnel, the Architect and you early in the project, whether required or not, may help you avoid substantial disappointment and potential loss of time and money later on. You will be miles ahead when working with an intergenerational project if you can



Photo by Cleone Mocik

work with these officials as your project develops, educate them about your goals and help them develop a vested interest in your success. These professionals are just as concerned about the health and welfare of your participants as you are, and are usually willing to help you problem solve to meet your project’s goals.

Many licensors will be unfamiliar with shared site intergenerational projects. If you encounter resistance by a child care or elder care licensor, it may be useful if both of you meet with a licensor from a neighboring region who has experience with intergenerational programs to discuss their experiences and thoughts on the project. Be sure that your Architect is aware that child care and most elder care projects have “operational requirements” in their licensing regulations that nearly always result in physical building requirements in addition to those listed in the “construction requirements” sections in those same regulations. If you can clearly articulate the operation of your program, early agency reviews should be able to easily identify any potential issues. It would be wise to take your project to the various agencies for informal review at the end of both the Schematic Design Phase and Design Development Phase, even if not required. Final Construction Documents are usually required to be submitted for all building permit and formal licensing reviews. Should

one of your state licensing agencies have no formal review process required for the project until after the building is ready to occupy (this is sometimes the result of funding cutbacks), be sure you've undertaken these informal preliminary reviews and documented them well. It is important to note that building and licensing code minimums for physical space in children's and elders' programs in most jurisdictions are usually well below acceptable good practice standards. Thus, they are not generally "target" standards.

FINDING AN ARCHITECT

Because the field is relatively new, you will probably not find a large number of architects in your geographic area that have experience with intergenerational shared-site projects (although these numbers are growing). One of the early exercises that you should undertake is a search for projects similar to what you envision your project to be. As you do, take the time to record the name of the architects as well as the project owners and location. Later, you can contact the owners to find out more about the success of their projects as well as their opinion of their architects. You can then contact the Architect for additional information, or to arrange an interview. Bring other key staff into the Architect selection process to help you.

The main self-governing membership organization for architects in the United States is the American Institute of Architects (AIA), and nearly every sizeable city has a branch office. The AIA does a great job of setting standards, providing architects and potential owners with helpful information in a "Working With Your Architect" format. Visiting your local AIA office to check out their resources is worthwhile. The local AIA usually maintains lists, portfolio information and brochures showing various architects' work and references. In addition, you can secure information from the national office at 1735 New York Ave., NW, Washington, DC 20006-5292, (800) 242-3837, infocentral@aia.org, www.AIA.org.

While the vast majority of architects are AIA members, this should not preclude considering qualified, licensed architects who are not. Take the time to dig deeply for information, including finding the projects and clients that aren't listed. Talk both to the people who worked directly with the Architect, and to the people who are currently living every day within their designs to learn

more about the architect's capabilities, and what the firm and the individuals are like to work with. (For specifics on interviewing potential architects and their previous clients, see Appendix 3-2, *What You Should Discover about Your Architect*.)

While most architects are trained as generalists to synthesize information from many disciplines, elder care and child care are very complex fields, and experience in these areas is highly recommended. It is important for the Architect to know what questions to ask and to effectively problem-solve. If you cannot find an architect with experience in intergenerational projects, you may need to settle for one with experience in only one area (child or elder care), and then find ways to bring in the other expertise during the programming and design process. For this, you might look outside the design field for people and organizations with hands-on operational experience. Generations United can assist by identifying successful intergenerational projects and resources.

Selecting an Architect who has intergenerational experience but is outside your geographic area offers the advantage of bringing special expertise to the project not available locally; however, this may limit your accessibility to them. Additional expense may also be a factor. While the Internet, email and teleconferencing are making this less of an issue, direct contact is still preferable. Architects from outside the geographic area are often willing to work in partnership with another firm that is local. This arrangement can offer you local representation, particularly during the bidding and construction process. If you opt for this arrangement, be sure the lines of communication and responsibility are clearly identified.

SELECTING A CONTRACTOR

The selection of a General Contractor is similar in process to that of selecting the Architect. Begin by looking at examples of buildings they've done of similar size and quality, and by digging deeply when checking their references. Be sure to talk to other architects who have worked with the contractors, not just to the project owners and users. You might also look to the Association of General Contractors for additional recommendations of qualified contractors in your area (national contact information: Association of General Contractors, 333 John Carlyle Street, Suite 200, Alexandria, VA 22314, (703) 548-3118, info@agc.org,

www.AGC.org). This organization is analogous to the AIA as a self-governing membership body for the commercial construction industry. There are also many quality contractors who are not members of the Association of General Contractors. Your experience during construction and the outcome of your project will, in large part, be contingent on the quality of the people in charge of the job. As with working with the Architect, continuity with the Contractor is critical. Insist that one project manager and superintendent be assigned for the duration of the project.

In most cases the decision to hire a Contractor does not need to be made until the design process is nearly complete. As part of their contracted services, your Architect will guide you through the contractor selection, bidding and contract negotiation process, and should be an integral part of the selection team. (For more information, see Appendix 3-3, *What You Should Discover about Your Contractor*.)

The Contractor's capabilities should match the scope of the work. A residential contractor may not have the experience, capacity and financial backing to construct a complex multi-million dollar project; likewise, a contractor that typically handles very large projects may not give appropriate attention to a small renovation project. Unless you have a reason to work with only one Contractor (e.g., an ongoing relationship on numerous similar successful past projects), you will need to get at least three pre-qualified bid proposals. Pre-qualifying the contractors prior to bidding assures that, regardless of who the successful bidder is, they will be qualified to handle the project.

UNIVERSAL PRINCIPLES AND COMMON DESIGN CONCERNS

In his books, *Assisted Living Housing For The Elderly*² and *Design for Assisted Living: Guidelines for Housing the Physically and Mentally Frail*,³ Victor Regnier provides a useful description of a variety of Design Principles for elder care, which are directly applicable to the design of intergenerational facilities and programs. Presented below are some universal design principles and common design concerns for intergenerational projects; some of these principles are adapted from Regnier's works. The issues addressed below are safety; program autonomy; privacy; proximity; special needs, consideration and empowerment; sensory issues;

materials, finishes and furnishings; connections to the community; residential environment; multiple/flexible use of spaces; and outdoor spaces.

Safety:

One of the most important program mandates is to provide a safe and secure environment for both children and for elders; this includes not only physical but also psychological safety and security. Children cannot be left unsupervised, and elders must be protected from undue risk.

In any quality living environment, there must be some acceptable level of risk. This is most evident in the childcare field with the controversy between providing a developmentally responsive environment versus a "safe" environment. This conflict is not as evident in the elder care industry, because in many cases, we've (inappropriately) managed to institutionalize and regulate much of the risk out of these environments. There is a tendency in many elder care settings (albeit with the best of intentions) to over-protect individuals, with the end result of perpetuating a sense of hopelessness and worthlessness.⁴ Growth is a lifelong process and confronting some amount of risk is required for any degree of meaningful growth. A careful balance must be struck that ensures the development of independence and self-esteem for all participants.

SAFETY & SECURITY

Some examples of ways to make a safe and secure environment include:

- Controlled entry areas with secured doors or a receptionist/greeter.
- Rooms and spaces that have no 'hidden' areas.
- Interior windows that provide views into other rooms allowing for more opportunities to watch and observe.
- Welcoming exterior fenced areas for play and exercise which in turn provide safeguard to the outdoors for both adults and children.⁵

Program Autonomy:

For intergenerational projects to be successful, eldercare and childcare programs (and other participating programs) must first be self-sustaining, high quality entities in their own right; the design and organization of spaces must reflect this. Only by ensuring self-sustaining, high quality programs independently can you then expect to nurture high quality intergenerational activity. It is unfortunate that some people look to intergenerational programs as a cure-all for insufficient individual program quality, or as a way to inappropriately economize on the use of building area. While there can be true building and operational economies realized by programs sharing space, most of these are in support areas such as administrative space, food preparation, storage, building circulation, and mechanical/electrical systems. One must be careful in assuming that intergenerational facilities can simultaneously use the same space at the same time and meet the *minimal* requirements for each of the two co-located programs—this is highly unlikely. Each component of the program can, and most certainly should, be designed to accommodate intergenerational activity within its individual boundaries, and within all additional shared common space; however, at the same time, the facility must maintain the capability of reverting back to non-intergenerational use. To emphasize the importance of dedicated individual program space within an intergenerational shared site configuration, one only needs to consider the possibility of one case of chicken pox. (For additional information on program

quality, see *Chapter 6: Curriculum Development and Intergenerational Activities* and *Chapter 7: Evaluation*.)

Privacy:

All individuals need time alone. Intergenerational shared site facilities must provide areas that support privacy for individuals and groups of varying size, for both intergenerational and non-intergenerational activities. Areas reserved for private and group activities are critical in fostering long-term relationships; these areas must be protected from disruption and unauthorized, unsolicited access. Supervision, particularly of children, is mandatory, as it is with many frail elders, but the design must allow supervision to take place in such a way as not to infringe on opportunities for relationship building. This can be as simple as an open alcove. This ability to withdraw must extend to staff as well, and points to the need for “down”-time spaces away from program activities. While one of the major goals of most shared site programs is to foster quality structured and unstructured intergenerational interaction, it is also important to remember that not all individuals will choose to participate; thus, the organization of spaces should respect this.

Proximity:

The proximity and configuration of intergenerational space can have a major impact on the quality of both structured and unstructured activities, the quality of relationships that develop between children and elders, and the long-term success of the program. Adjacency allows overlapping program space and maximizes opportunities for quality intergenerational interaction. While successful quality intergenerational programs can occur where close proximity is not provided, the energy required to perpetuate such programs increases rapidly in proportion to the distance. Similarly, the opportunities for more frequent and spontaneous intergenerational interactions increase dramatically as the distance decreases.⁷ (See Appendix 3-4 for hypothetical models of shared site programs, listing attributes of each.)

Careful attention to transitions between spaces is important. Often, a physical layout that provides a “safe” transition between spaces can be beneficial in encouraging interaction between generations. Such a transition might allow the ability to observe activities without commitment, to gradually become involved in increasing levels of activities, and to safely withdraw

PROXIMITY/INCIDENTAL CONTACT

Some examples of ways to create an environment of unstructured interaction include:

- Setting up or creating potential “run in” nodes or areas where different groups can come together and interact in a more casual, unstructured way.
- Lobbies or common gathering spaces, corridors or natural paths of travel that display an area of interest (e.g.: the window seat or furniture such as benches encourages interaction that all ages can use).⁶

physically or psychologically. For example, the careful placement of adult furniture within a childcare classroom near an entry, maybe in loose proximity to a dramatic play area or home center, might attract visitors, allow subtle entry, provide opportunities for non-threatening interaction, offer multiple levels of involvement, and allow quick escape.

Take the time during the design process to experiment with different scenarios using the building plans. Where will most of the intergenerational activities take place? How will participants get there? Push for creative new solutions. For example, it may at first appear counter-intuitive, but creating circulation patterns and common areas that cause elders and children to accidentally “bump up” against one another, occasionally getting in each other’s way, can be of great benefit in fostering informal connections.

Special Needs, Considerations and Empowerment:

Design of quality intergenerational environments must respect the dignity of the individuals and be appropriate for all ages and capabilities. Ensuring accessibility and maximizing opportunities for success are basic code requirements that all environments should provide, and should do so without negative connotations and stigmas. In fact, well beyond code requirements, accessibility must be viewed as an enhancement of opportunities for all of us. Beware that strict compliance with barrier-free codes does not ensure that accessibility needs are necessarily met; sometimes they are actually in conflict with those needs. As a prime example, American Disabilities Act-mandated toilet heights and grab bar configurations address the needs of only a portion of disabled children and elderly individuals. Often accessibility is just a matter of thoughtful planning with little or no cost impact to the design, such as lowering light switches and adjusting the placement of windows.⁸

Maintaining control over one’s own environment and maximizing opportunities for success are crucial in promoting self-esteem and empowerment in both the young and the old. Lack of this control is the hallmark of an institutional environment. In elder care, we live with the vestiges of an acute-care (control) model that has dominated nursing homes and other formal care settings for decades.⁹ The fields of elder care and child care have much to learn from one another. An approach that empowers the individual through meaningful

EMPOWERMENT

Some examples of ways to encourage individual control include:

- Universal design (e.g. counters with varying heights, open access, easily understood space).
- Operable windows that allow for control over the amount of light or temperature.
- Promoting mutual respect for spiritual, cultural, and social structures between Community, Family and Individual.
- Personalizing space (e.g. murals, artwork and memorable objects all encourage ownership and a sense of belonging at any age).¹⁰

choice, self-direction and cultural relevancy is important to foster at all ages and abilities.¹¹

Sensory Issues:

Intergenerational environments should respect the similarities and differences in the way elders and children perceive and respond to the environment. Considerations should include sound, temperature, ventilation, smell, touch/tactile, reverberation, lighting glare and contrast, color, enclosure, scale, depth perception, taste, etc. Explore ways to simultaneously use the environment to provide stimulation for the failing senses in the elderly and for the budding new senses in the young.¹²

Materials, Finishes and Furnishings:

While maintenance and durability of materials are important, care should be taken not to allow these factors to institutionalize the environment. Two themes repeat themselves in nearly all projects: sacrificing user benefit for ease of maintenance (e.g., vinyl flooring vs. carpeting), and the tendency toward too much uniformity (e.g., using the same light fixtures or matching furniture throughout.) Consider how you would approach decisions for different spaces in your own home. Wherever possible, include the program participants in the selection processes. Explore environmentally responsible concepts such as “green building” and “sustainable construction.” (More information is available through the U.S. Green

Building Council, 1015 18th Street, NW, Suite 508, Washington, DC 20036, <http://www.usgbc.org/>.)

Connections to the Community:

The concept of building intergenerational connections does not stop at the front door. Do not overlook the opportunity to make portions of the facility available to the surrounding community. Providing meeting and activity space in parts of the facility that are not being used in the evenings or at certain times of the day can offer tremendous benefit both to the community and to your programs; this often can be accomplished with little or no changes in the building design. Activities that bring in individuals from the neighborhood offer opportunities for forging new relationships, and can also provide an excellent source of volunteers and future program participants.

It is of particular benefit to effectively engage parents and family members who are in the building on a regular basis, but often for only brief periods of time. Consider arranging space in such a way that informal connections can develop. For example, the goal of getting parents efficiently in and out at the end of the day might be secondary to parents meeting their children's older friends. Consider placing sign-in spaces for child care parents deep within the facility so that they are sure to come in contact with elders and staff. Comfortable seating at the edges of spaces used for intergenerational activities encourages parents and family members (and

building staff) to sit and observe, and perhaps participate. There is a tendency to design intergenerational programs and facilities for just the targeted groups (e.g., the very young and the very old), excluding the wide age range that might be represented by staff, volunteers and visitors. Make your facility truly intergenerational by consciously building in opportunities for connections to be made across the age spectrum.

“Residential” Environment:

When developing environments intended to bring individuals together, include the concept of “home” as an analogy for arranging spaces and activities, the design of the aesthetics, and the selection of furnishings. Home provides a context that directs behavior for all of us.¹⁴ Developing a sense of home will help break down personal barriers and foster communication between different age groups. Pay particular attention to the scale of the environment, the variety of spaces and the materials used.¹⁵ Because of the number of individuals involved, both elder care and child care environments can too easily take on institutional or commercial characteristics.

Intergenerational environments should be stimulating, aesthetically pleasing, intimate and should display a sense of familiarity and history. Personalization of spaces should be encouraged. Allow the users to leave their “imprint” as concrete evidence of their presence.¹⁶ This is a reminder of ongoing intergenerational involvement when other participants are not present. It also provides an eclectic atmosphere that helps combat the tendency for some facilities to feel institutional.

Home denotes a place where one is safe and maintains control over one's own surroundings. Because control is what truly differentiates institutional from non-institutional environments, it is important to ensure that as much of the control of the environment as possible is kept in the hands of the end users.

Multiple/Flexible Use of Spaces:

Wherever possible, consider intergenerational programming throughout the shared site facility and plan the environment appropriately from the start. Intergenerational opportunities are feasible in an area like an activity kitchen, craft area, lounge, classroom, gymnasium, horticultural therapy room, garden, music

FLEXIBILITY

Some examples of ways to make a flexible environment include:

- Movable walls.
- Furniture that can be easily re-arranged or used as room dividers.
- Interior windows that allow for limited involvement or 'previews' before entering.
- Finish materials and room layouts that can accommodate multiple activities (e.g. antimicrobial carpets, painted walls with eggshell finish, rooms with partial carpet/partial vinyl tile, open design).¹³

room, dining room, occupational therapy/physical therapy area, chapel, pool, the entry lobby and others.

Outdoor Spaces:

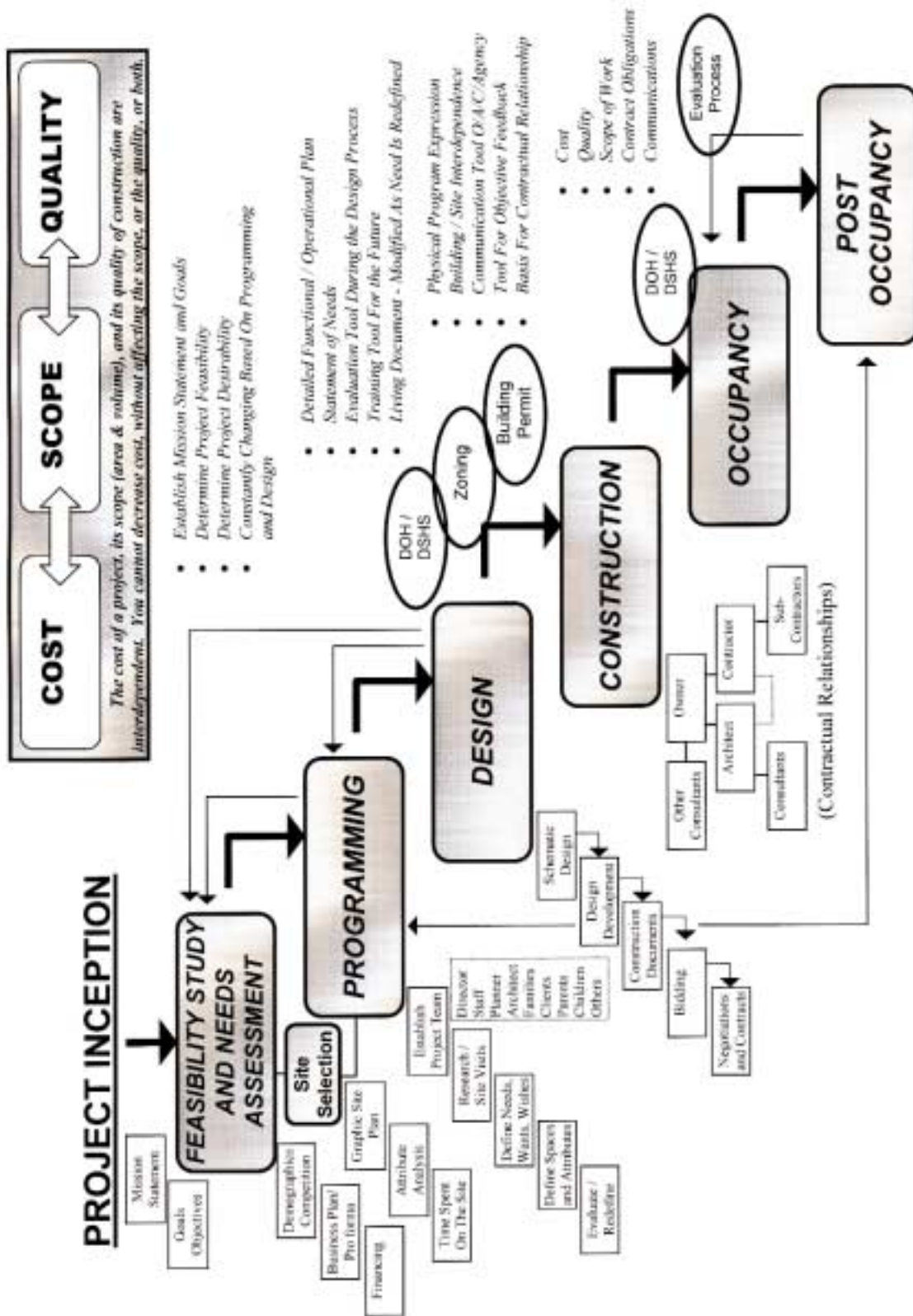
Outdoor spaces offer special opportunities for inter-generational interaction. Activities like gardening present unique opportunities for elders and children to focus outside of themselves and, in turn, be receptive to relationship building. Children's gross motor activities can be a major focus of observation for adults. Sand and water offer opportunities for imaginative play, sensory stimulation, and fine motor development for both children and elders, and memory gardens will stimulate discussion and stories. Provide protection from wind, sun, glare and rain, and be sure to design for accessibility. Outdoor areas should be separated into active and quiet spaces. Areas reserved for observation should be protected and located at the edges of areas of focus, and opportunities for socialization at multiple levels should be provided. Be sure to ensure the ability to unobtrusively supervise all activities.

CONCLUSION

Distinct building types evolve because they respond to sets of commonly repeated functional elements. Facilities specifically designed for elders and those designed for children, as well as most other types of buildings, are recognizable because they express the successful spatial relationships that have survived over time. Intergenerational programming and design is evolving rapidly and, with it, comes opportunities to explore new ways to bring the generations together. There is every reason to expect that intergenerational shared site facilities will also develop their own recognizable building types, expressing the creative solutions springing from the shared lives within. It is important that we all see ourselves as vital links in this chain. The innovative ways that you incorporate best practices into your project, the new discoveries that evolve through testing the ways the physical environment can support and nurture intergenerational relationships, and the overall success of your project will serve as an example to those who follow.

- ¹ Pena, W., & Parshall, S. (2001). *Problem Seeking: An Architectural Programming Primer, 4th Edition*. John Wiley & Sons, Inc.
- ² Regnier, V.A. (1994). *Assisted Living Housing For the Elderly*. New York: Van Nostrand Reinhold.
- ³ Regnier, V.A. (2002). *Design for Assisted Living: Guidelines for Housing the Physically and Mentally Frail*. New York: John Wiley & Sons.
- ⁴ Richardson, M., Fiedler, F., Bond, G., Keeran, C.V., McNeese, P., Ogden, R. (1997). *Managing For Quality In A Nursing Home: A Resident-Directed Approach*. Seattle, Washington: Center on Disability Policy and Research, School of Public Health and Community Medicine, University of Washington.
- ⁵ Contributed by PACE Architects, Milwaukee, WI. For more information visit www.pacearchitects.com or contact (414) 273-3369 or inquiry@pacearchitects.com.
- ⁶ Ibid.
- ⁷ Turner, D. (1995). *Intergenerational Child Care In Residential Elder Care Facilities in Progressive Architecture - P/A Plans - Nursing Homes and Child Care Centers*. Cleveland: Penton Publishing.
- ⁸ North Carolina State University, The Center for Universal Design. (1997). *The Principles of Universal Design*. Retrieved January 2005, from POV/PBS, P.O. Box 5034, Bowling Green Station, New York, NY 10274-5034, web site http://www.pbs.org/pov/pov2004/freedommachines/special_universal.html.
- ⁹ Lustbader, W. (March-April 2000). The Pioneer challenge—changing the culture of long-term care. *Aging Today*. Retrieved January 2005, from <http://www.asaging.org/at/index.cfm?page=http://www.asaging.org/at/at-212/toc.cfm>.
- ¹⁰ Contributed by PACE Architects.
- ¹¹ Bredekamp, S., & Copple, C. (Eds.). (1997). *Developmentally Appropriate Practice In Early Childhood Programs*. Washington, DC: National Association for the Education of Young Children.
- ¹² Venolia, C. (1988). *Healing Environments*. Berkeley, CA: Celestial Arts.
- ¹³ Contributed by PACE Architects.
- ¹⁴ Weinstein, C.S. & David, T.G. (Eds.). (1987). *Spaces For Children*. New York: Plenum Press, p. 84.
- ¹⁵ Regnier, V.A. (2002).
- ¹⁶ Greenman, J. (1988). *Caring Spaces, Learning Places*. Edmond, WA: Exchange Press, p. 74.

Appendix 3-1 Building Project Progress



Appendix 3-2 What You Should Discover About Your Architect

The following are a few things you should find out about any architect you are considering:

1. *Ask them to show you their portfolio of recent work.* First, give them a good idea of your vision for the project. Ask them to show you both projects similar to yours, and projects that they felt were particularly successful. If they do not have intergenerational projects, find out how much experience they have in the design of facilities for either children or elders. Have them describe the main challenges they encountered and what processes were used to resolve design problems. Ask them how the problem solving used with these projects might be applied to your project. Be sure to get a list of projects, past clients and references to take with you before you leave.
2. *Have them describe their design process.* How will they gather information from you, and other information on the project? How will they prioritize information? Do they have a formal programming process? Are they flexible and receptive to your ideas and the needs of the project? How often and at what points will you be involved? (How involved do you want to be?) Will they use sketches? Build models? Arrange field trips for you? Have them describe the process from beginning, through construction, all the way to occupancy. Find out what services they will provide at each step and what services are optional vs. required.
3. *Ask the Architect why you should use them rather than another architect.* Unless you have a very good reason to go with a particular firm, you should interview at least three firms.
4. *How long do they estimate that the design process will take? How long will construction take?* Discuss with them your schedule, anticipated finish date and any critical target dates. Ask them what issues might potentially cause delays.
5. *What kind of track record do they have with similar projects and other clients?* Ask for a list of references. Call around. Ask references how they found the Architect to work with. Did they communicate well? Were they responsive? How much of an interest did they take in the project?
6. *What is their track record for cost estimating?* Are their projects typically bid within budget without substantial redesign? How would they approach a project if it does come in over budget? They may also be able to give you some idea of the cost of similar projects, or some cost-per-square-foot information for this building type.
7. *Which individual(s) will you be working with from the Architectural firm?* Who will be your primary contact for the entire project? If this is not one person, how will they assure a smooth and seamless transition? (Ask to meet the other individuals with whom you will be working.)
8. *How busy are they?* Is this an important project to them? Will it keep their priority attention?
9. *What additional consultants will the Architect need?* Why are these services needed?
10. *What are the Architect's expectations of you?* What will you be required to provide? And when?
11. *What are their fees?* How do they establish them? If the program or scope changes, how will this be addressed? How will Consultants be compensated? Ask them how much they would estimate the fee to be on this project. Be careful if you are going to bid architectural fees competitively. You might want to carefully define first a scope of work you hope to build (area, construction budget and a description—based on other projects you've seen), and secondly a specific scope of architectural services. Also, be sure you pre-qualify your "shortlist" of potential architects based on all the other criteria first. The fee difference between architects can quickly be recovered or lost simply due to the operational efficiency of the final design.

12. *Ask them what other resources you might research.*

They may know where you might find information on projects similar to yours – books, magazines, other Owners of similar projects. It is worth asking while you are there.

13. *Do they have recommendations for contractors that have done similar work?* The Architect sees a very different side of the construction process than do most project Owners. Do they have good working relationships with a number of contractors?

- For additional information on selecting an Architect, see The American Institute of Architect's *Selecting*

Your Architect at: http://www.aia.org/pub_yaya_selecting.

- For information on typical Architectural services, see *Identifying the Services You Need* at: http://www.aia.org/pub_yaya_identifyservice.
- For fee methods, see *Compensating Your Architect* at: http://www.aia.org/pub_yaya_compensation.
- Much more information on dealing with your Architect is available at: http://www.aia.org/pub_default.

Appendix 3-3 *What You Should Discover About Your Contractor*

The following are a few things you should find out about any contractor you are considering:

Your Architect can assist you through the Contractor selection process. You can also have the prospective Contractor fill out AIA Document A-305, *Contractor's Qualification Statement*, from which several of these questions were derived. These questions might be appropriate for interviews to pre-qualify Contractors. Your Architect will be able to help you interpret responses.

1. *What is their experience on similar projects?* Give them a good description of the scope of your project. If your project involves renovation, be sure that they can document good experience with renovation projects.
2. *Ask them why they think they are the best Contractor for this project.*
3. *How long have they been in business?*
4. *Have they worked with your Architect?* Ask them for a list of other Architects they have worked with in the region, along with the specific names of the projects and contact information.
5. *Is most of their work primarily through bidding projects?* Or are most of their projects negotiated? Do they do public bid work?
6. *Who will be the personnel assigned to your project?* Specifically, who will they assign to be the Project Manager? Who will be the Superintendent? These are key people in determining the outcome of your project. Ask for their resumes and references for review. Secure a commitment to have the same Project Manager and Superintendent assigned to the project for its duration. Ask to meet and interview these people.
7. *How busy is the Contractor?* Will they be able to devote adequate time to your project? What other projects will they be working on at the same time?
8. *What is their insurance coverage?* You should consult with your insurance company for advice on the insurance coverage you will require of the Contractor. You should require the Contractor to deliver a certificate of insurance to your insurance agent for review prior to beginning construction. Be sure the contract requires them to carry liability insurance, builder's risk insurance and workers' compensation
9. *Ask what their bonding limit is?* A performance (and payment) bond is an insurance policy for the duration of construction that financially protects the Owner should the Contractor default on performance of the contract. Ask the Contractor if they have ever failed to complete a project, and if so, why? Seek advice from your insurance agent on specifics, but generally, the bond should be for at least the cost of the construction project. Bonding agencies evaluate bonding capacity on the Contractor's past experience and financial solvency. If a Contractor cannot be bonded for the amount of the contract, you should clearly find out why.
10. *Ask for business references.* It is important that the Contractor is financially strong.
11. *Verify that they are a Licensed Contractor.*
12. *Do they have any current litigation underway?* Past litigation?
13. *Do you feel you can communicate easily with the Contractor's personnel?* Are they open to your ideas? Do they instill confidence?
14. *Do they work with a number of highly qualified subcontractors in the areas of work most crucial to your project?* Be sure that the Contractor has a good selection of trades people and subcontractors from which to receive competitive bids.
15. *What professional trade organizations does the Contractor belong to?*

16. *When checking references, ask at least the following:*

- a. Did they stay on schedule? Did they stay within budget?
- b. Did they perform professionally? Provide good documentation?
- c. Were the Contractor's key personnel accessible?
- d. How were their communication skills? Were they timely with responses?

e. Were their costs reasonable? Did they request unreasonable Change Orders?

f. Would you use them again? Why? Why not?

Reference: AIA Document A-305, *Contractor's Qualification Statement*, available through The American Institute of Architects, 1735 New York Ave., NW, Washington, DC 20006-5292, Phone: 800-242-3837, Fax: 202-626-7547, E-mail: infocentral@aia.org, www.AIA.org.

Appendix 3-4 Archetypical Program Models for Intergenerational Shared Site Facilities

Note: *This information was originally assembled for facilities with child care programs sharing the same site as residential care programs for frail elders. It is presented only as an example of one way the structure of shared sites might be viewed; however, the principles remain valid for many other intergenerational shared site forms.*

The number of child care centers participating in intergenerational programs at eldercare facilities across the nation is rapidly increasing. Involvement has typically ranged from short visits, to the establishment of on-site child care centers. Because intergenerational interaction has historically been a by-product of other forms of care, the quality has varied substantially from program to program. More recently, facilities are looking at intergenerational connections as one of their primary program goals. Now, a number of new facilities are being established around the needs of the very young to the very old, on a permanent, daily, on-site basis.

Intergenerational shared site facilities and programs can be of great benefit to participants. Elders receive emotional support, gain a sense of self-worth, are motivated to participate in physical activity, have the opportunity to transfer knowledge, and hold hope for the future. Intergenerational involvement offers children the opportunity to learn about normal aging processes, develop an acceptance of persons with disabilities, be part of an extended family, feel needed, and receive unconditional and unbounded love and attention. For the facility, this is an opportunity to attract highly qualified staff and reduce staff turnover, increase productivity, apply limited physical and financial resources much more effectively, and develop a holistic approach to care that is re-connected to the natural cycles of life.

With the rapidly changing face of elder care, the demand for higher quality child care, the increasing numbers of families with both aging parents and young children, and shrinking social and financial resources, this concept of care is holding great promise; with it comes the emergence of a new building type.

Within these facilities, the allocation, proximity and configuration of intergenerational program space can have major impacts on the quality of both structured and unstructured activities, the quality of relationships that develop between children and elders, and the long-term success of the program.

In a survey of existing intergenerational programs involving full-day child care co-located with skilled nursing facilities, six different physical "models" were identified. For convenience, they are defined as separately functioning concepts, although in reality most existing programs are hybrids comprised of two or more of these models. While the program models listed below represent archetypical examples of how child care might be integrated into residential elder care settings, the applications extend to other forms of intergenerational shared site facilities, as well.

ARCHETYPICAL PROGRAM MODELS

In general terms, types 1 through 6 represent increasing opportunities for intergenerational interaction.

Type 1: "Separate" Child Care Building Separate from Elder Care Facility, but Located on the Same Physical Site

This type of program operates much as an off-site child care "visitation" program might, where children from the outside arrive to participate in structured, event-specific activities with elders. It is often difficult for staff from both the child care side and the elder care side of the program to work together to organize activities. Opportunities for informal, unstructured activities are virtually impossible without staff intervention. Day to day communication between the different programs is difficult, and the risk of program deterioration at the slightest adversity is high.

This type of program can be successful, but because intergenerational contact is limited, it depends upon an extraordinary amount of staff energy and commitment. Activities are much more time consuming, and program spontaneity and continuity are both severely limited. Because additional time is involved, which usually

equates to staff costs, strong support from facility administration is required.

Type 2: "Remotely Attached" Dedicated Child Care Center Attached to Elder Care Facility, but Remotely Located from Resident Activity Areas.

In this model, the child care center may be physically attached to the elder care building, but because of distance, configuration, policy, etc., it effectively operates in the same manner as the Type 1 ("Separate" model), with the primary advantage that poor weather ceases to be a barrier to contact.

Type 3: "Closely Attached" Dedicated Child Care Center Closely Attached to the Elder Care Facility and Closely Located to Resident Activity Areas

Here the child care center is at, or adjacent to, the center of the elder care facility. Due to the proximity of the programs, opportunities for children and elders to come in contact with one another increase significantly. Children and elders can observe each other from one space to the next, and eye-to-eye contact often leads to closer involvement. Communication among staff from both sides of the program is much easier. Opportunities for scheduled activities for children within the elders' areas increase; likewise opportunities for elders' activities increase within the child care spaces. Open access for residents to visit the child care areas at-will (and vice versa) can result in long term bonds. The ability to react to unplanned opportunities can add incredible richness and quality to the program.

Type 4: "Satellite" a Single Primary Child care core, with Remote Child Care Satellite Spaces/ Classrooms Located Directly within the Elder Living and Commons Areas

By providing a centrally positioned child care center of Type 1 (Separate), 2 (Remotely Attached), or 3 (Closely Attached), and locating additional dedicated, full-time child care space in the elder facility (e.g., in a resident wing adjacent to a smaller resident activity area), smaller groups of children and elders can come to better know one another. The "satellite" can function as a full-time classroom, or can be a space in which different children spend only part of their day. Here, intergenerational connections can be much more participant-driven.

Type 5: "Intergenerational Family Room" Dedicated Central Intergenerational "Commons" Space, with a Closely Attached Dedicated Child Care Center

Under this model, a separate space is dedicated specifically for intergenerational use. It may be used at some times for elder-only activities and sometimes for child-only activities, but the primary intent is to provide an area of "common" ground, functioning much as the family room does in many homes. Ideally, the "intergenerational family room" is situated adjacent to both the child care and the resident activity areas, with direct physical and visual access to and from both. While this space may be very well-suited for planned, structured activities, the true benefits lie in opportunities for fostering informal interaction between children and residents, and thereby encouraging friendships and long-term relationships.

Type 6: "Dispersed" Dispersed Child Care Located in Spaces Shared between Child Care and the Elder Care Facility

There exist a few programs that fully integrate the use of the majority of common areas in a facility for intergenerational use. Here, activity areas, dining spaces and sometimes even therapeutic spaces are used at different times of the day for elder activities, for child activities and for intergenerational activities. Because of the intense overlapping use of the environment, in most instances activities and spaces must be carefully scheduled. Throughout the day, groups may move through the facility much like in a dance. Opportunities for intergenerational connections to occur are abundant.

With energetic, well-trained staff, good communication and supportive administration, this type of program can result in quality interactions and the development of long-term relationships between children and elders. Unfortunately, there are also major drawbacks: often children have minimal or no home base of their own, both groups cease to have a choice in participation, and privacy is greatly sacrificed. Potential for conflicts is high. Children, and sometimes elders, are limited by the amount of time they can spend in one location, and are often required to terminate an activity when it would otherwise be beneficial for it to continue. Program quality may ultimately suffer for all participants. This type of program requires a great deal of energy and commitment to maintain.

This model is extremely difficult unless developed in concert with at least one of the other archetypes as the dominant model.

CONCLUSION

In summary, proximity is a key element in encouraging successful intergenerational programs. These six shared site models offer varying opportunities for intergenerational contact. While it is possible to develop quality programs in any of the models, some present more obstacles than others. Of the individual models outlined above, Type 5, the "Intergenerational Family Room," as a single approach to the physical layout of intergenerational programs, perhaps holds the greatest potential for developing and perpetuating high quality interactions, fostering long term bonding relationships between children and elders, and ensuring overall program success. It is unique in that it provides an area defined as the "property" of both the elders and the children, while allowing individuals the choice to withdraw from this portion of the program.

Opportunities for maximizing program quality for all participants in similar intergenerational shared site programs may rest in creative combinations of these models. One might envision a facility in which the

primary model is comprised of a series of interspersed satellite spaces tightly linked with family rooms forming individual intergenerational "households," or perhaps a series of interconnected intergenerational "cottages." Day to day activities would be inclusive across the age spectrum and structured to meet the developmental needs of all.

In a time when the graying of America is at hand, and our future rests both in the quality of care we impart to our youngest members and the degree to which we value the contributions made by our elders, it is our responsibility to ensure that we provide every opportunity for our success. There now exists successful operating models of intergenerational programs that attest to the effectiveness of this vital connection. Intergenerational shared site facilities of the future may incorporate both hybrid forms of the archetypes defined above and other forms yet to be conceived, and will undoubtedly evolve their own unique building types.

Adapted from "Intergenerational Child Care in Residential Elder Care Facilities" by Dyke Turner, originally published in the May 1995 edition of *Progressive Architecture Plans - Nursing Homes and Child Care Centers*.

Appendix 3-5 Architectural Programming

William Pena states that since architectural design is problem solving, architectural programming is “Problem Seeking... the search for sufficient information to clarify, to understand, to state the problem” (from *Problem Seeking: An Architectural Programming Primer* by William Pena).

The following are examples of some of the nuts-and-bolts information that you and the design team will need to collect and document prior to beginning the design process. These lists are neither intended to be comprehensive nor provide a substitute for any formal architectural or functional programming. In some cases the prospective Owner may not have the benefit of this service due either to cost or access, or for a very small project the scope of the work may not justify their need. Regardless, this information can serve as a basis for organizing around your specific physical and operational needs, will give the project design team a good head start in the “problem seeking” and “solving” processes, and will hopefully lead to may more questions.

In addition, the Program Document will need to address many less tangible elements than those listed here, information beyond that needed to merely produce floor plans. For example, it might be appropriate to include guidance on issues like how the building and spaces support the social and psychological needs of its occupants, or in what ways the environment impacts relationship development between children and the elderly.

Where possible, the information included should draw from many disciplines, particularly current research in fields like Aging and Early Childhood Development and Environmental Psychology. You should also be aware that although typically discussed as formal phases, there is really no distinct line where architectural programming actually stops and the design process begins. The information gathering and problem solving processes should continue through programming, design, construction and occupancy; and will be of benefit to you if included as one of the components of your ongoing evaluation.

Why develop an Architectural Program?

An Architectural Program should provide:

1. An organizing tool for planning, developing overall goals and objectives, and assigning roles
2. A concise informational platform, including definitions of scope and quality, from which the architectural design team can design the project
3. An organizing tool for developing the overall project schedule, and identifying global to individual tasks to be accomplished
4. An opportunity for the Owner to evaluate a wide range of decisions well before design begins
5. A tracking tool for recording changes and alternatives during the phases of design
6. Information with which financial decisions can be made
7. Information to use in developing feasibility studies
8. Information to use in developing marketing materials
9. An educational reference tool to be used for facility operations and staff training
10. An historical record of the process for outside evaluation purposes and possible replication in future intergenerational shared site projects

What makes up an Architectural Program?

I. Base Information:

- A. Statement of Purpose / Vision
- B. Philosophy and description of the organization
- C. Discussion of Goals and Objectives
- D. Attitudes toward costs, quality, time, scope
- E. Detailed functional narrative—This key piece of the Program describes the anticipated day-to-day functioning of the various program components and supporting systems that must be

accommodated within the building(s). It should include detailed information on how the intergenerational program is envisioned, identification of all participants, activities and interactions, benefits, cautions, anticipated outcomes, etc., from the global level to small group participation and individual involvement. Some of the more detailed information may be more appropriately listed under sections describing individual spaces.

- F. Trends in the field of intergenerational programming that might affect planning
- G. Any other global information relevant to the project

II. Community Considerations:

- A. Amenities available within the community (parks, healthcare, fire station, stores, etc.)
- B. Context and character of surrounding neighborhood (e.g., age and ethnic diversity, urban/suburban/rural, access to nature)
- C. Proximity to program participants (Where do families of children and elders, staff, visitors come from?)
- D. Project scale compatibility with neighborhood (positive and negative impacts)
- E. Access to public transportation
- F. Specific adjacent property uses
- G. Community master development plans
- H. Noise
- I. Pollution (air, soil, water)
- J. Vehicular access to the site
- K. Pedestrian access to the site
- L. Traffic conflicts
- M. Others

III. Site Considerations:

- A. Site configuration and usable site area
- B. Zoning
- C. Easements
- D. Views in, views out
- E. Future expansion capacity
- F. Topographical features (slope, soil studies, ground water, etc.)
- G. Natural amenities (notable trees, rocks, streams, etc.)
- H. Flood levels
- I. Climate data (prevailing winds, solar access, micro-climates, etc.)
- J. Pedestrian access and circulation on the site

- K. Vehicular access and circulation on the site
- L. Landscaping
- M. Site lighting
- N. Security, safety.
- O. Parking.
- P. Utilities (water, power, sewer, communications.)
- Q. Clear title to ownership of the property.
- R. Others

IV. Building Considerations:

- A. Types and hierarchies of programs and activities to be accommodated.
- B. Relationship of proposed spaces/functions.
- C. Detailed user information – age, roles, interests, relationships, aspirations
- D. Movement of users (staff, adults, children, visitors, others)
- E. Movement of materials/supplies
- F. Primary loading/unloading
- G. Service access/deliveries
- H. Capacity or need for overlapping functions
- I. Future expansion
- J. Need for flexibility, adaptability
- K. Architectural character
- L. Relationship to the site and to the community
- M. Building Accessibility
- N. Type of construction
- O. Energy efficiency
- P. Sustainable “green” building processes
- Q. Emergency egress
- R. Porches
- S. Secondary supporting spaces (e.g., storage, mechanical, custodian, circulation)
- T. Others

V. Detailed Space/Activity Considerations: This is usually presented as a list of individually proposed spaces that the building is to accommodate, as well as some activities that can’t be described in terms of single spaces.

- A. Activities, and use patterns within each space (room)
- B. Lists and descriptions of all potential users
- C. Size/area (net usable)
- D. Proximity and relationship to other spaces, transitions
 - 1) Strong vs. weak connections
 - 2) Types of connections (e.g., physical, visual, audible, restrictive, open)
- E. Rooms within rooms (e.g., closets, lofts, offices, activity centers, resting alcoves)

- F. Furniture and equipment
- G. Materials and finishes
- H. Sensory (e.g., noise, vision, glare, acoustics, tactile, vibration, smells, scale, enclosure)
- I. Privacy vs. interaction
- J. Psychological and social needs of the users
- K. Supervision
- L. Security
- M. Capacity and flexibility for accommodating other uses
- N. Character
- O. Lighting (artificial and day lighting) and lighting control
- P. Physical and visual connections to the exterior
- Q. Utilities & services required
- R. Specific regulatory requirements (e.g., emergency egress, ventilation, windows, accessibility)
- S. Energy considerations
- T. Mechanical (e.g., heating/cooling, electrical, plumbing)
- U. Others

VI. *Financial Considerations:*

- A. Construction budget
- B. Construction financing
- C. Operating Budget
- D. Ongoing project cost estimates
- E. Land costs
- F. Permits
- G. Development and “soft” costs
- H. Professional fees
- I. Special requirements of funding (e.g., HUD financing requirements)
- J. Life-cycle costs
- K. Others

VII. *Schedule considerations:*

- A. Prioritization of tasks
- B. Key decision points
- C. Assigned roles and responsibilities
- D. Critical paths, mitigation of potential delays
- E. Coordination with outside events (e.g., the beginning of the school year)
- F. See Appendix 3-6, “Hypothetical Project Schedule” for additional considerations

VIII. *General Project Constraints:* Elements of these type place important limits on potential design solutions.

- A. Zoning

- B. Building codes
- C. State agencies
- D. Lending institution limitations
- E. Planning Boards and Community development restrictions
- F. Utilities
- G. Geotechnical limits
- H. Cost
- I. Licensing
- J. Time
- K. Others

IX. *Program Form:* Architectural programming methods vary widely. Information is commonly presented in some combination of these forms. The main intent is to make information comprehensive and easily retrievable.

- A. Functional narrative, including a clear presentation of overall goals and objectives
- B. A list of spaces and functions to be provided, with detailed descriptions of sub-functions, required attributes, users, equipment and furnishings (See lists above)
- C. Relationship and process diagrams
- D. Conflict diagrams
- E. Pre-schematic plan drawings, “bubble diagrams”
- F. Sketches
- G. Overlay mapping
- H. Checklists
- I. Matrices
- J. Flow Charts
- K. Reference lists
- L. Anticipated outcomes to be used later for evaluation
- M. Others

Sources of Information:

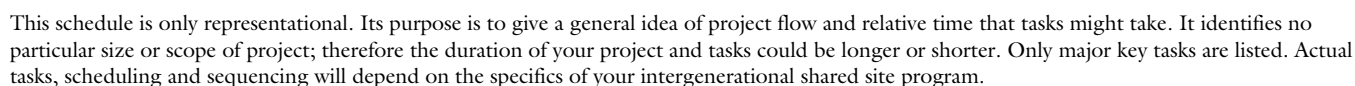
1. Child Development/Aging/Intergenerational advocacy groups, associations and coalitions.
2. Books/periodicals, other literature surveys
3. Intergenerational web searches
4. Observation and analysis of existing programs
5. Analysis of the individuals and community to be served - client interviews and questionnaires
6. Site visits
7. Financial/business consultants
8. Funding/grant writers

- 9. Outside consultants
 - A. Researchers
 - B. Architectural
 - C. Engineering
- 10. Building Codes/Zoning Codes/Other codes
- 11. City, county and state studies (population, growth, traffic)
- 12. Cost data publications

- 13. Product manufacturers and associations
- 14. Others

References:

- Pena, W. & Parshall, S. (2001). *Problem Seeking: An Architectural Programming Primer*, 4th Edition. New York: John Wiley & Sons Inc.
- White, E.T., (1972). *Introduction To Architectural Programming*. Tucson: Architectural Media, Ltd.



Chapter Four Staff Development, Training and Retention

By Vicki Rosebrook, Ph.D. with Kelly Bruno

INTRODUCTION

Intergenerational shared site programs provide opportunities for young and old to come together and share their talents, knowledge and resources, allowing their unique personal experiences and expectations to shape their interactions. The power of combining populations across the age spectrum is realized at intergenerational shared sites throughout the country. One such program, owned and operated by the Marilyn & Gordon Macklin Intergenerational Institute, is located in Birchaven Retirement Village in Findlay, Ohio. Here, it is not at all uncommon to find a grandpa feeding a baby, a grandma rocking a toddler, or several preschool children folding clothes with senior participants. It's all a part of the spontaneity of everyday life that occurs naturally within the intergenerational shared site environment. The Macklin Institute is one model among a wide range of intergenerational programs in this country that provide simultaneous care and interactions for children and seniors in an intergenerational shared site.

This scenario sounds comforting, and it does have a tendency to stir emotions in our hearts, but . . . the success of this and other intergenerational shared site programs is strongly correlated to a comprehensive staff development program that prepares qualified intergenerational professionals to work simultaneously with individuals across the age spectrum.

Quality intergenerational interactions do not spontaneously occur as a result of combining children and seniors. Typically, children and seniors rely on staff members for planning, implementation, follow-through and closure. Consequently, intergenerational shared site programs can only be as effective as the staffs that are facilitating them. Staff members cross-trained in intergenerational practice, that possess the requisite knowledge and skills related to working concurrently with children, youth and seniors, are the heart of intergenerational shared site programs.

The purpose of this chapter is to address content relevant to staff development, training and specific tools required to empower, educate, respect, appreciate and retain staff, as well as potential certifications available to individuals who are, or desire to become involved in, intergenerational programming. Specifically, it addresses the rationale for professional development and cross-training; processes and procedures required to ensure reciprocity between staff working with children/youth and those working with seniors; techniques for cross-training and professional development; staff retention tools; ways to produce staff/board buy-in; and the benefits of employing an Intergenerational Coordinator. While the chapter is not all-inclusive, it is designed to identify the requisite competencies of individuals involved in intergenerational initiatives; the basic guidelines required for preparing individuals to work simultaneously with children, youth and seniors are suggested.

For the purpose of clarity, definitions of the following terms discussed in this chapter are presented below:

- *Practitioners* are the individuals who are actively engaged in programs/initiatives involving children/youth and senior adults.¹
- *Cooperating staffs* are the employees and/or volunteers from child, youth and senior environments that work together in intergenerational shared site programs.
- *Cross-training* refers to preparation for staff that addresses both early childhood and gerontology, and ensures that the knowledge, skills and dispositions needed to work and interact with individuals across the age spectrum are transferred to the intergenerational practitioner.²
- *A credential/certificate* is written documentation that an individual has met specific standards and demonstrated competence in intergenerational practice.³



Photo by Carolyn S. Klenk

- *Professional development* refers to ongoing growth and improvement in one's knowledge and career.
- *An Intergenerational Coordinator* is a staff person who has the responsibility of ensuring that intergenerational interactions and activities, staff trainings, and communication take place.⁴

RATIONALE FOR PROFESSIONAL DEVELOPMENT AND CROSS-TRAINING

According to the 2000 United States Bureau of National Population Projections, there were 40 million children under the age of ten, and 35 million people age sixty-five and over. By the year 2030, these numbers are projected to double.⁵ Demographics indicate that the demand for child and senior adult care is rapidly increasing. Escalating numbers of children require daily supervision while their parents work, and more adults are living to advanced ages; therefore, both age groups are in need of some degree of care.

Frontline workers in both work settings often lack the necessary training, receive low wages and have high employment turnover rates; these factors can negatively affect the quality of care. The overall quality of child care and senior care are national issues facing similar challenges.⁶ The U.S. Bureau of Labor Statistics currently reports a decline of day care workers as a result of an annual turnover rate of 50 to 54% and fewer qualified workers entering the field. A similar need exists for professionals to care for senior adults, who are the fastest growing segment of our population.⁷

According to Nancy Hooyman, in her 2002 article *Taking Care of the Caregivers*: "Caregivers of older adults are providing more long-term care for older adults, but often lack the preparation for effective high-quality care and the ongoing support to sustain it. However, these crucial but underpaid frontline workers do not feel prepared, respected or valued. Not surprisingly, the turnover rate is high, with 90 percent of direct care staff replaced annually."⁸

Likewise, AARP identified that there are thousands of sites across the nation already offering intergenerational activities, yet employees of these facilities lack adequate cross-training to work simultaneously with younger children and senior adults.⁹ In the growing field of intergenerational programming, initiatives are emerging so rapidly that individuals with little education and experience are being asked to provide quality multi-age interactions and programs. This potentially creates situations in which intergenerational shared site programs lack leadership and have no one with the appropriate expertise to counsel and/or guide cooperating staffs should challenges and issues arise.

When there is a lack of qualified individuals prepared to facilitate appropriate interactions, intergenerational shared site programs may struggle unnecessarily. Accordingly, programs that have the potential for producing positive outcomes for younger and older participants may not realize their objectives unless more attention is paid to preparing these practitioners. Staff members that work in these diverse environments and deal with challenging dynamics deserve the opportunity to acquire training and/or professional development related to intergenerational issues.

According to Rosebrook, Haley and Larkin, "Proficient intergenerational care providers need to: comprehend the importance of communication and collaboration skills; understand integrated subject matter and knowledge from related disciplines; utilize appropriate evaluation techniques; and be reflective, caring professionals. They must possess the knowledge and understand the theory that guides them as they attempt to create intergenerational shared site programs, develop curriculum, resolve issues, document and evaluate program success, and assess and make recommendations for intergenerational 'best practice'."¹⁰

Imagine for a moment the stereotypical image of a "traditional" long-term care facility—quiet, mono-

chromatic, not very diverse age-wise. Now, transpose upon that image pictures of older people reading to young children, feeding babies, singing and dancing. By observing the smiles on their faces, the touching of hands and the expressive looks in their eyes, we recognize and acknowledge that both age groups are benefiting from the interaction. But the deeper meanings of the experience speak in a quieter voice. Underneath the obvious “fun” component, the children are empowered to learn that older people are valuable, capable, energetic, and most importantly, that they take the time to notice them. The seniors are provided opportunities to recapture confidence, gain a sense of purpose, and enjoy the occasion to share their unique life experiences and knowledge with the children.

In order to create quality intergenerational experiences, practitioners must understand the philosophy behind environment development, the importance of multi-age interactions, and the processes and procedures that ensure reciprocity between cooperating staff, children, youth and seniors.

PROCESSES AND PROCEDURES REQUIRED TO ENSURE RECIPROCITY BETWEEN STAFF WORKING WITH CHILDREN, YOUTH AND SENIORS

Intergenerational programs may encourage and facilitate interdependency and generational understanding, but education and training in intergenerational issues helps us gain a broader perspective of our common needs and goals.¹¹ While it is true that there are many unknowns and, until recently, few guidelines for educating individuals who work with such age-diverse groups, it is also understood that what unifies these groups is common knowledge. Inevitably, in intergenerational shared site programs, much of the learning takes place on-site; therefore, it is especially crucial to collectively involve everyone. If multi-age programs are to emerge with a united common goal, cooperating staffs must be cross-trained, encouraged and empowered.

The quality of life for both age groups can be enhanced through interrelated and stimulating intergenerational activities, provided by qualified staff that know and understand developmentally appropriate practices across the lifespan.¹² If this process [cross-training] is looked upon as a proverbial blank canvas, there is the opportunity to create something extraordinary from

what is often viewed as the many fragmented pieces.¹³ Those involved in intergenerational shared site programs must be excited by the challenge; to be successful, they must find trainers with combined professional experiences, employ supportive administrators and retain enthusiastic staff members who can bring the intergenerational dream to fruition.

Fundamental to the creation of quality, generationally-enriched milieus are cooperating staffs that are properly trained, highly skilled, and knowledgeable about the development and abilities of individuals across the entire age span. Staff are the foundation of the service system; in other words, services cannot exist without the staff to deliver them. “Teachers and the nursing-center staff will need to plan some activities together to make sure the activities fit the needs of both groups.”¹⁴ Effectively trained cooperating staffs understand the importance of collectively planning and facilitating activities that are beneficial for multiple ages. For example, consider this pre-planned cookie making experience:

*Tex (78 years old) and Emily and Jae (two-year olds), share and compare their cooking experiences. Tex recalls fond memories of his mother baking cookies for him, while Emily and Jae have their own ideas of what goes into a cookie recipe. Here is where the magic happens: open discussion, enhanced self-esteem and self-worth, combined stimulation, enthusiasm and companionship are ultimately achieved by the time the cookies are done baking. Oblivious to the benefits of intergenerational interactions such as this, Emily, Jae, and Tex will tell you the best part of this activity is eating the cookies . . . together!*¹⁵

In this particular experience, staff members without appropriate cross-training may have believed it was more efficient for staff to prepare the snack and serve it at a specific time, not realizing that such “efficiency” would come at the cost of the senior’s independence. In such environments—where there is little room (or use) for individual creativity—freedom of choice, spontaneity and autonomous thinking are likely to be stifled. Conversely, cross-trained staffs understand that when seniors are making cookies with youngsters, there is some freedom. The seniors can enjoy the moment, enjoy the children and . . . enjoy the cookies.

Intergenerational shared site programs may have some staff members that are less inclined to promote multi-

age interactions and program success, and others that are more apt to do so. By making an initial investment in cross-training cooperating staffs, programs are more likely to reap the benefits when these practitioners are put into uncommon, and oftentimes, uncomfortable situations. When cooperating staffs experience both the “usual and the unusual,” it is essential for them to understand how to respond appropriately. Cross-training enables staffs to be more proactive and less reactive, thus empowering them to spend less time “fixing” situations and more time facilitating meaningful and productive experiences within the intergenerational setting.




TECHNIQUES FOR CROSS-TRAINING AND PROFESSIONAL DEVELOPMENT

Intergenerational studies and cross-training have evolved as a natural outgrowth of intergenerational programming. Consistent with this increase is an expanding interest in professionalizing the intergenerational field.¹⁶ An effort to professionalize this type of work exists and, increasingly, reference is made to the

intergenerational field.¹⁷ Hence, Larkin and Rosebrook conceptualized and developed the *Guidelines & Standards for Intergenerational Practice*. They claim, “Until the same overarching principles begin to guide the full range of program models that already exist, there can be no consensus among practitioners for what constitutes effective intergenerational programming or professional expertise.”¹⁸

“Until now there wasn’t anything out there that married the different disciplines in a way that shed light on how the staff can best provide quality programs for children and adults together. So when thinking about the curriculum, we must consider what should occur when they are together. There has been curriculum for children, and there are activities for older adults, but what is good curriculum for them together?”¹⁹ This endeavor to professionalize the intergenerational field recognizes that knowledge and skills may be obtained in diverse ways and through a variety of models including academic preparation, experiential learning and on-the-job training (See Table 4-1).

Table 4-1: Options for Providing Intergenerational Cross Training

ACADEMIC PREPARATION (School or Postsecondary Study)	EXPERIENTIAL LEARNING Academic & On-the-job Training Combined	ON-THE-JOB TRAINING (Work related Experiences)
		
Degree Programs	Certificate/Credential	Continuing Education Units/Hours
Integrated Coursework	Preparation for Career	Formal Learning Experiences
Rigorous Intellectual Training	Planned & Sequenced	Conferences
Guidelines & Standards Focused	Links Theory to Practice	Workshops
Student Documents Growth	Connects to Outside World	Informal Learning Experiences
		Mentoring Opportunities
		Guidance by Supervisor

Academic preparation (school or college instruction) of intergenerational practitioners includes opportunities to demonstrate knowledge of curriculum planning and implementation, program evaluation, family systems theory, cultural difference and social policy; it also includes opportunities to participate in supervised

practice in a variety of field research, service-learning and internship experiences. Intergenerational courses of study must integrate information from a variety of disciplines and diverse literature, and must focus on the value and effects of intergenerational programming on the participants, family systems and communities.²⁰ The

course of study needs to reflect that “the most effective curriculum-based intergenerational activities are not about aging per se, but about people who happen to be different ages sharing interest and expertise.”²¹

Intergenerational studies is an emerging discipline that integrates relevant knowledge from multiple domains, provides a framework for professional skill development, and suggests appropriate dispositions for individuals to work simultaneously with younger age groups and senior adults.²² Interestingly, closely related fields (e.g., early childhood, youth work and gerontology) consider many of the same areas as the essence of their emerging professions.²³ Intergenerational studies not only combines a variety of ages, it marries academics to human services, and blends two distinct fields of study—early childhood and gerontology—creating unexplored possibilities for an emerging field of study.

In the 1990’s, two universities—Wheelock College in Boston, Massachusetts and The University of Findlay in Findlay, Ohio—offered Intergenerational Studies Programs. At the present time, however, no post-secondary degree programs could be identified. Training institutes, university courses and a variety of academic options have been initiated to prepare people to work as intergenerational specialists.²⁴ Also starting in 1990’s, Generations Together at the University of Pittsburgh and the Association for Gerontology in Higher Education began a 6-year project that funded 66 colleges and universities to assist faculty in integrating intergenerational service-learning to existing aging courses. A recent survey of participating faculty had a 74% return rate and found that of those, 90% were still offering the intergenerational course (for more information on this project visit <http://service.gt.pitt.edu/>).²⁵ In addition to those mentioned above, some of the colleges and universities that offer intergenerational courses and/or training modules include Virginia Tech, Oakton Community College, Penn State University, Temple University, and the Intergenerational Urban Institute at Worcester State College.

Experiential learning, a combination of academic and on-the-job training that results in a certificate or credential, is an important aspect of the cross-training process. Certificate and credential programs combine on-site involvement with a course of study. They are typically designed to deliberately build specific

outcomes, and require a significant time involvement in intergenerational programming. Experiential learning offers individuals opportunities for self-study and reflection; opportunities to observe and/or practice in a variety of settings with diverse ages; collaboration and networking possibilities with many intergenerational professionals; and opportunities to apply science and theory to practice.

Two types of Intergenerational Certificates currently exist. Generations Together, at the University of Pittsburgh, offers a continuing education certificate, the *Intergenerational Specialist Certificate*. It is designed to enhance competence for professionals working in intergenerational programs or related efforts (see www.gt.pitt.edu/IGCertificate.html). The Rose Brook Journey, a credential for intergenerational practitioners, is offered by the Macklin Intergenerational Institute. This continuing education credential prepares participants to develop intergenerational programs and explains the “how to’s” of facilitating cross-generational interactions. (See www.mackliniginstitute.org/clic.asp).

On-the-job training, preparation that occurs while completing work-related responsibilities, may occur formally or informally. Formal training or professional development consists of conferences, instructional sessions, workshops and programs provided by qualified intergenerational professionals. Intergenerational practitioners and/or professionals modeling appropriate behavior, providing guidance as they delegate tasks, and mentoring staff are examples of informal training opportunities. Creative and effective intergenerational practitioners are the product of individuals who continue to learn about intergenerational programming, seek new challenges, and explore innovative ways to grow and improve, either formally or informally.

Professional self-understanding assists practitioners in realizing their individual needs and taking advantage of opportunities for continued professional growth. Continuous growth and understanding also empower staff to use newly acquired knowledge in a way that benefits children, youth, senior adults, families, staff and themselves. Assessing knowledge and skills, and continually building upon them, is required to develop and refine intergenerational practitioners. The *Individual Assessment for Intergenerational Professional*

Development & Effectiveness (see Appendix 4-1) assists staff members who wish to evaluate their formal training needs; and the *Outline for Intergenerational Practitioner Professional Development* (see Appendix 4-2) provides step-by-step guidance for specialized growth and improvement.

A number of organizations and institutions offer conferences and/or workshops that provide professional development and cross-training opportunities specific to intergenerational shared sites. Generations United, the Chicago Metro Intergenerational Committee, Generations Together, Intergenerational Strategies, the Macklin Intergenerational Institute, ONEgeneration and Temple University's Center for Intergenerational Learning are among these. This list is not exhaustive. Contact Generations United or visit www.gu.org for information on upcoming conferences and trainings. There is also a variety of resource materials available upon request and/or purchase from the aforementioned organizations (see Appendix 4-3 for contact information).

Failure to continue to learn can perpetuate inept, nonprofessional practice.²⁶ Therefore, it would be reasonable to presume that the continued development of children and senior adults is contingent upon opportunities afforded staff to develop and grow. According to AARP:

Ongoing cross-training is an opportunity to build a team of staff and volunteers from all program components. Professional development can be considered as prevention for future problems and maintenance of a quality program, just as good nutrition and exercise are important for our health and wellness. Ongoing training tends to help maintain staff satisfaction and positive feelings about their work, both of which are generally accepted as strongly associated with low staff turnover-rates.²⁷

Cross-training is important for all staff of the program including the van driver, nurse, kitchen staff, dietician, etc. The intergenerational program should not operate

in isolation and everyone interfaces with the program if not directly then tangentially.

RETENTION TOOLS REQUIRED TO EMPOWER, EDUCATE, RESPECT AND APPRECIATE STAFF

In order to maintain effective intergenerational shared site operation, it is important to minimize staff turnover. Cross-trained staff should be considered an intergenerational shared site's most valuable resource.

Buildings, furnishings, equipment, materials and supplies are replaceable, but replacement of cross-trained staff is often problematic. The loss of valued and cross-trained "family members" (cooperating staff) can have a negative impact on the continuing effectiveness of program operation.

When staff members not only feel valuable, but more importantly feel valued, they are less likely to leave or seek alternate employment. As Dr. William Thomas, founder of the

Eden Alternative,TM proclaimed in 1998, "As you do unto employees, so too will they do unto participants." Respect and authentic appreciation signal to staff members that they are truly valued. When staff members feel valuable and valued, and believe that they are an instrumental and significant part of their intergenerational family, a team or community develops and is more likely to stay intact.

Staff empowerment and connection establish a sense of support that encourages individuals to ask for professional and personal assistance from one another when necessary. Mutual support assists in maintaining positive environments, a sense of commonality and community. This is important because in today's society, individuals often live long distances from their nuclear families, and the "intergenerational shared site community" can offer staff members a welcoming place to belong. Here, individuals meet others with similar aspirations, talk over their mutual concerns, and absorb principles of interaction, respect and authentic appreciation, as they themselves participate in multi-age activities. Establishing a professional mentoring program, where more

experienced staff serve as mentors to new staff members, can also help increase staff retention.

To ensure effective operation, well-defined roles, employee handbooks, coherent and concise written job descriptions and performance assessments are necessary for each staff member. Clearly-defined supervisory roles are also necessary; however, as much as possible, staffs should be encouraged to draw on their own strengths, their abilities, resources, time, skills and interests. Ultimately, internal operation is contingent upon cooperating staffs who realize that their work is worthwhile and has merit.

WAYS TO FOSTER STAFF/BOARD BUY-IN

“Top-down” and “bottom-up” participant buy-in is essential in producing successful intergenerational programs. This is accomplished by ensuring that the staff views themselves as a unified team with common interests and are provided opportunities to engage in interdisciplinary dialogue and relationship building. It is necessary to develop staff into professionals who:

- Embrace participants from multiple generations;
- Seek to produce new outcomes, particularly in regard to intergenerational goals;
- Value and incorporate goals from other disciplines that serve the intergenerational shared site setting;
- Demonstrate the team approach; and
- Recognize, appreciate and promote benefits of intergenerational exchange.

Research and real world experience suggest that effective interdisciplinary connections cannot be created solely from the top down as Poole, et al. state: “They will grow best from serious and intensive interaction between [professionals] from many fields. This should facilitate the breakdown of barriers imposed by the jargon that has developed around field-centric (work), the methodologies favored by specific disciplines, and the out-group biases honed by reinforcing the values of one discipline through . . . criticisms of others.”²⁸

A successful intergenerational shared site program requires that care providers are able to understand each other’s language and value each other’s contributions.

This is best accomplished through fostering an environment that encourages all staff to think of themselves and co-workers on the same team. Research by Tyler and Blader demonstrate that group identity is a primary foundation for cooperative group behavior. They write, “Identity issues dominate people’s motivation to voluntarily cooperate with the groups to which they belong.”²⁹

It is critical for all parties affected to be involved in the planning process.

In addition, when seeking collective buy-in from staff, board and the community, it is important to focus on program design and planning. Thorough design and planning assist in ensuring that the intergenerational initiative does not fail. All stakeholders involved—board members, activities coordinators, staffs, children, senior adults, families and administration—should be encouraged to provide input and feedback in the decision making

Photo by Jayne Hafer



process. “When a collaborative group shares the responsibility of determining the ‘why, what, where, when, and how’ of program development and maintenance, intergenerational shared site programs have a greater chance of being successful.”³⁰

Establishing a clear and understandable program philosophy (values and beliefs) helps to ensure that cooperating staffs are moving in the same direction and guarantees that all collaborative partners are in agreement. The program’s vision, mission, goals and objectives drive the entire program, bottom-up and top-down. Clear articulation and documentation of the program’s vision, mission, goals and objectives ensures a concrete and comprehensive plan. (See *Chapter 1: Visioning and Assessment* for more information.) Likewise, all staff and program participants need a clear understanding of what is expected of them.³¹ Therefore, during the recruitment, hiring and orientation process, the program’s vision, mission, goals and objectives should be shared with potential and/or new staff.

- The *vision* is the big picture, the image or the initiative concept.
- The *mission* is the overarching theme, the undertaking and task.
- The *goals* are the broad statements of purpose that are not measurable.
- The *objectives* are the measurable outcomes and indicate specific tasks.

Staff orientations serve as an important means of familiarizing new staff with policies, procedures, facilities, organizational structure, schedules and operational logistics. Orientations are also an excellent time to communicate the program’s philosophy and define the importance of participant involvement. In order to provide programs with the best chance of success, it is important to help persons identify the unique contributions they can make as part of a team of competent professionals, committed to the common goal of making the program succeed.³²

Participant benefits of any intergenerational program rely on frequency, consistency and attendance in activities. Not surprisingly, the effectiveness of the

intergenerational staff relies on frequency, consistency and attendance at team meetings. It is important for each team meeting to include one or more representatives from each discipline serving participants. That is, if a shared site program links teenagers with older adults, it is essential that each team meeting include equal representation by professionals who are responsible for the outcomes of the activity for the youth, and those who are overseeing the outcomes for the seniors. In this way, the needs of both generations can be met, the biases addressed and the best possible opportunities developed. If one of these disciplines is absent, you run the risk of creating inappropriate activities.

BENEFITS OF AN INTERGENERATIONAL COORDINATOR

A 1998 survey, completed by AARP, indicated that “the designation of a staff person who has the responsibility of ensuring that intergenerational interactions and activities, staff training and communication take place is extremely important to the success of an intergenerational shared site program.”³³ The survey also identified that without an Intergenerational Coordinator, intergenerational activities seldom take place and are not well planned.

Specific tasks and responsibilities of an Intergenerational Coordinator vary, but might include:

- Communicating program mission, values, goals and objectives;
- Providing leadership for diverse staffs;
- Planning and facilitating team meetings;
- Coordinating interdisciplinary training and cross-training opportunities;
- Engaging staff members in the decision making process;
- Overseeing and facilitating activity evaluation and sharing of outcomes;
- Collaborating with board, advisory committees and the community;
- Assessing staff behaviors within the intergenerational context; and

- Encouraging, recognizing, rewarding and celebrating staff successes.

When synthesized, the Intergenerational Coordinator is responsible for identifying, hiring, training, assessing, encouraging and rewarding staff. Ultimately, however, this professional's primary mission is to guarantee successful facilitation of intergenerational exchanges among and between program participants. An Intergenerational Coordinator has vast potential for being an enormous asset to the intergenerational shared site program (See Appendix 4-4 for a sample *Intergenerational Coordinator Job Description*).

Conversely, many intergenerational shared site programs function quite effectively without an Intergenerational Coordinator; in this case, however, support and collaboration among cooperating staffs is critical. For example, the Adult Day Care and Child Development Center at Easter Seals Miami-Dade convenes an agency wide team which meets regularly to develop a monthly intergenerational calendar and programming curriculum. In the absence of an Intergenerational Coordinator, teamwork becomes essential for operational success. Three levels of cooperating staff teamwork—cooperation, collaboration and synergy—are needed in order to design and maintain beneficial intergenerational programs. A sense of community is often witnessed within intergenerational shared sites when individuals cooperatively move toward collaboration, and eventually into synergism (See *Three Levels of Teamwork* chart, Appendix 4-5).

Cooperating staffs that practice the *Three Levels of Teamwork* increase their chances of effectively operating an intergenerational shared site program. It appears that the recipe for intergenerational shared site success is fairly simple: take appropriately cross-trained staffs who possess a clear vision and understanding of the program's missions, goals and objectives; add staff and board buy-in; and combine with cooperation, collaboration and synergism. One optional ingredient that could be added in order to enhance the possibilities of intergenerational shared site program operation is an Intergenerational Coordinator. However, anecdotal documentation, surveys and observation have provided evidence that many intergenerational shared site programs function successfully when an Intergenerational Coordinator position is not a possibility, if

cooperating staffs work together cooperatively, collaboratively and synergistically.

CONCLUSION

The success of all intergenerational programs depends on the amount of planning and preparation that goes into the developmental state.³⁴ Likewise, the success of intergenerational practitioners depends on the quality of cross-training they receive. In order to ensure continued growth and sustainability for organized child and senior interactions, intergenerational shared site programming must blend many components: young people and senior adults; child and senior adult care staffs; academics and human services; early childhood education and gerontology; pedagogy and experience; and oftentimes, facilities that were originally designed to provide segregated care and activities for youth and senior adults. While blending is often difficult, the appropriately cross-trained intergenerational practitioner understands the importance of looking for commonalities among the individual components. Well-trained practitioners realize it is the similar experiences in each of the unique professions that eventually bridge the gap that might otherwise divide them.

Since this is a developing field, it is particularly important for staff to keep abreast of emerging trends, new research, and promising practices. One venue is to join Generations United, the membership organization for the intergenerational field. GU's biennial conference, online resource center and program directory, and quarterly newsletter can all be accessed for current information. Competent and knowledgeable staffs are capable of developing and implementing effective and responsive lines of communication, planning quality interactions and understanding the importance of integrating generations.

At the heart of the effort to promote quality intergenerational shared site programs is a substantial investment in education and training for those who work with youth and seniors. Cross-training (i.e., academic preparation, experiential learning and/or on-the-job training) assists in preparing individuals to work effectively with children, youth and seniors. Staff and board buy-in supports the formation of clearly articulated program philosophies that, in turn, provide strong foundations upon which intergenerational shared site programs can be built. This strong and solid base

leads to sustainable intergenerational programs where staffs are cross-trained, empowered, respected, appreciated and retained; consequently, young people and senior adults reap the benefits.

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- ⁸ Hooyman, N. (2002). Taking care of the caregivers. *Assisted Living Success*. Retrieved December 21, 2004, from <http://www.alsuccess.com/articles/271feat2.html>
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- ¹⁴ Whitely, J. (2001). The intergenerational environment. In E. Reynolds (3rd Ed.), *Guiding Young Children: A Problem-solving Approach*. (p. 374). Mountain View, CA: Mayfield Publishing Company.
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- ¹⁸ Rosebrook, V., & Larkin, L. (2003).
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- ²² Larkin, E., & Rosebrook, V. (2002). *Standards for intergenerational practice: A proposal*. *Journal of Early Childhood Teacher Education*, 23, 137-142.
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- ²⁶ Katz, L. (1984). Focus on what is appropriate curriculum for pre-kindergarten. Presented at National Association for the Education of Young Children Conference, Oregon.
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- ³² Mack, C. & Wilson, J. (1989, March). Share it with the children. *Generations Together*.
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Appendix 4-1 Individual Assessment for Intergenerational Professional Development & Effectiveness

Individuals are able to determine personal strengths and challenges working in an intergenerational program by rating the following items based on knowledge, skills and per-

formance. The form is intended to assist individuals with professional development needs and goal setting. It is not intended as an evaluative tool.

Excellent	Good	Satisfactory	Not Applicable
3	2	1	0

With my knowledge of Lifespan Human Development/Interpersonal Relationships, I:

- ☐ understand individual needs.
- ☐ value and encourage multi-age relationships.
- ☐ use appropriate guidance methods.
- ☐ utilize positive reinforcement techniques.
- ☐ avoid threats.
- ☐ avoid the condescending use of names.
- ☐ avoid "baby talk."
- ☐ offer and respect choices.
- ☐ recognize individual and age appropriate abilities.
- ☐ relate to individuals.
- ☐ relate to small groups.
- ☐ relate to large groups.

I am able to create an intergenerational environment that is:

- ☐ generationally-enriched.
- ☐ appropriate architecturally.
- ☐ safe, secure and reassuring.
- ☐ equipped for small and large motor experiences.
- ☐ arranged for both group and individual activities.
- ☐ accommodating to active and quiet events.

When creating an intergenerational climate, I provide an appropriate environment that:

- ☐ is welcoming and inviting.
- ☐ supports an open-door policy.
- ☐ maintains ongoing communication.

When creating an intergenerational climate, I value program participants, including:

- ☐ children and senior adults.
- ☐ families.
- ☐ staff members.

I comprehend the importance of intergenerational interactions by:

- ☐ recognizing "teachable moments" and following through with extensions.
- ☐ encouraging program participants to explore.
- ☐ empowering program participants to make choices, and respect their choices.
- ☐ allowing spontaneity.

When relating to families, I understand how to:

- ☐ respect family members.
- ☐ converse with family members.
- ☐ share pertinent information with families.
- ☐ maintain confidentiality among families and staff.
- ☐ recognize familial concerns and values for their loved ones.
- ☐ ask family members for pertinent information and advice.

My Professionalism/Professional Development is evidenced by:

- ☐ recognition and use of policies and procedures.
- ☐ attendance at staff meetings.
- ☐ wise application of sick and vacation time.
- ☐ membership in professional organizations or associations.
- ☐ attendance at trainings and cross-trainings.
- ☐ use of appropriate terminology.
- ☐ attitude and disposition.
- ☐ dress attire.

Appendix 4-2 Basic Outline for Intergenerational Practitioner Professional Development

I. Complete Groundwork

- A. Pre-preparation: determine disposition (attitude) appropriateness
- B. Clarify personal feelings on aging
- C. Assess personal comfort level of working with each age group
- D. Assess level of comfort related to difficult topics such as illness, death, special needs, unusual appearances, etc.

II. Initiate Goal Setting

- A. Assess knowledge and skills related to intergenerational programming
- B. Build on existing skills
- C. Take advantage of professional growth opportunities

III. Participate in Cooperating Staff Cross-training

- A. Schedule times for formal trainings
- B. Generate informal gatherings (e.g., discussion groups, social events, meals)
- C. Provide on-site in-service trainings

IV. Continue Professional Growth

- A. Commit to common goals
- B. Identify unique needs

Appendix 4-3 Contact Information

Chicago Metro Intergenerational Committee

c/oUniversity of Illinois Extension
Attn: Maureen Statland
1699 Wall Street, Suite 500
Mount Prospect, IL 60056
847-437-6449 x 209
Contact: Maureen Statland
E-mail: mstatlan@uiuc.edu

Generations Together

University of Pittsburgh
121 University Place, Suite 300
Pittsburgh, PA 15260
412-648-7150
Contact: Jim McCrea, Executive Director
E-mail: jmccrea@pitt.edu
www.gt.pitt.edu

Generations United

1333 H Street, NW, Suite 500W
Washington, DC 20005
202-289-3979
E-mail: gu@gu.org
www.gu.org

Intergenerational Strategies

75 Windwatch Drive
Hauppauge, NY 11788
631-232-1262
Contact: Paul Arfin, President and CEO
E-mail: igstrats@optonline.net
www.igstrats.org

Macklin Intergenerational Institute

15100 Birchaven Lane
Findlay, Ohio 45840
419-425-3047
Contact: Vicki Rosebrook, Executive Director
E-mail: vrosebrook@mackliniginstitute.org
www.mackliniginstitute.org

ONEgeneration

17400 Victory Boulevard
Van Nuys, CA 91406
818-708-2345
Contact: Kelly Bruno, Vice President
E-mail: kbruno@onegeneration.org
www.onegeneration.org

Temple University Center for Intergenerational Learning

1601 North Broad Street, Room 206
Philadelphia, PA 19122
215-204-6970
Contact: Jeanette Bressler, Director of Research and
Long-Term Care Initiatives
E-mail: jeanette.bressler@temple.edu
www.temple.edu/cil

Appendix 4-4 Sample Intergenerational Coordinator Job Description

The following job description is included with permission from the Mt. Kisco Intergenerational Community, a collaboration of two, private, not for profit agencies, Family Services of Westchester and Mt. Kisco Day Care Center. The Community combines child care and adult day care in a specially constructed building with a home-like design on the interior and exterior, daily intergenerational activities, and monthly special events involving parents and caregivers. This description is presented only as an example of one way the position of Intergenerational Coordinator has been described; however, the principles remain valid for many other intergenerational shared site forms.

MT. KISCO INTERGENERATIONAL COMMUNITY INTERGENERATIONAL COORDINATOR JOB DESCRIPTION

Under supervision of Family Services of Westchester (FSW) & Mt. Kisco Day Center (MKDCC) Program Directors as part of the Intergenerational Program Committee, coordinates, plans, implements and supervises the intergenerational program. Performs related duties as required.

Responsibilities:

1. Organizes a comprehensive program of intergenerational activities, tailored to the needs and interests of children and senior adults.
2. Orients, trains, supervises and evaluates the work of a variety of volunteers, staff, student interns, etc.
3. Interfaces with program staff to evaluate services and develop innovative plans for intergenerational enrichment.
4. Facilitates planned activities by contacting agencies or individuals to provide programs or classes of interest.
5. Serves as an advocate and change agent for issues pertaining to the integrity and safety of the intergenerational programs and environment.

Takes necessary action using own initiative in a timely and effective manner.

6. Prepares written documentation as required by the program and regulatory agencies such as statistical records, quality assurance/improvement monitors and other related reports in a timely manner.
7. Communicates with Program Directors, in a timely and clear manner, critical and sensitive issues related to services, staff management and overall compliance with agency and program policies.
9. Coordinates work of research staff and program staff.
10. Represents program and serves as liaison to families, referral sources, community agencies, social service agencies and others as requested.
11. Identify and research community resources for possible linkages.
12. Responds promptly to changes in workload, adjusting assignments as necessary to achieve optimal productivity and efficiency.
13. Provides clear and comprehensive verbal and written coverage plans for assigned activities in advance when preparing for a scheduled absence.

Qualifications/Skills:

Minimum Bachelor's degree in an area of Early Childhood Development, Gerontology, or Health and Human Services with related experience working with children and elderly populations in an intergenerational setting. Master's Degree preferred -

- Demonstrated qualitative direct care experience working with diverse children and elderly populations.
- Strong interpersonal skills-
- Demonstrated leadership and creative program planning skills.

- Skills must reflect adaptability to changing consumer needs and programmatic goals.
- Responsive to varying and unpredictable situations.
- Effectively manages multiple priorities and inquiries that may cause occasional pressure.
- Manages emergency and crisis situations promptly and astutely.
- Involves lifting, reaching, stooping, bending and intermittent exertion when performing some direct care services.
- Must possess a valid driver's license to operate a motor vehicle and maintain a driving record in good standing when driving an agency vehicle is a required Job function.

This job description should not be construed to imply that these requirements are the exclusive standards of the position. Incumbents will follow any other instructions and perform any other related duties, as may be required by their supervisor.

FOR MORE INFORMATION ON THE MT. KISCO INTERGENERATIONAL COMMUNITY CONTACT EITHER:

My Second Home

Adult Day Program of Family Services of Westchester
95 Radio Circle

Mt. Kisco, NY 10549

Contact: Lois Pellegrino, Program Director
914-241-0770

E-mail: mysecondhome@fsw.org

www.mysecondhome.org/index.html

Mt. Kisco Day Care Center

95 Radio Circle

Mt. Kisco, NY 10549

Contact: Dawn Meyerski, Program Director
914-241-2135

E-mail: dmeyerski@mkdcc.org

www.mkdcc.org

Appendix 4-5 Three Levels of Teamwork within the Intergenerational Environment

COOPERATION	COLLABORATION	SYNERGY
Working jointly	Working together toward a common goal	Combined actions
PARTICIPANTS	PARTICIPANTS	PARTICIPANTS
<ul style="list-style-type: none"> • Supply needed information • Make referrals 	<ul style="list-style-type: none"> • Share information & resources • Connect with one another 	<ul style="list-style-type: none"> • Work as a functioning machine • Stand united
COOPERATION IMPLIES:	COLLABORATION IMPLIES:	SYNERGISM IMPLIES:
Participants work separately toward an agreed upon outcome.	Participants work together toward an agreed upon outcome.	Participants' efforts are completed entirely for group success.
Each participant provides their own separate piece of the puzzle.	There is buy-in from each participant leading to entire group success.	The group effort is more important than each participating individual.

Reference: Rosebrook, V. (2003). On *101 things you always wanted to know about intergenerational programming*, [DVD]. Mt. Lebanon, PA: Badger Vision.

Chapter Five Marketing

By Sheri Y. Steinig with Paul Arfin

INTRODUCTION

Incredible things happen every day at intergenerational shared site programs throughout the country. Children, youth and older adults benefit from the unique opportunities presented in these environments. In Rantoul, Illinois, lower-income senior residents of the “planned neighborhood,” *Hope Meadows*, get reduced-rent housing in exchange for providing at least eight hours of support each week to children and their foster parents also living in the community. In Orlando, Florida, older adults in need of long-term care and children with rehabilitative and chronic needs receive collective care at *Grandma’s House*, a community-oriented intergenerational housing facility. In Jenks, Oklahoma, daily activities are planned for interaction between the children and the elders at the *Grace Living Center* a combination nursing home, preschool and kindergarten developed in partnership with the public school district. In Columbus, Ohio, the *Generations* program brings together older adults from an adult day program, while children from a child care center for homeless children are housed in the same building. And outside of Boston, Massachusetts, older learners from *Lasell Village*, a continuing care retirement community on the campus of Lasell College, participate side-by-side with traditional college-age students in intergenerational classes and other college activities (see Appendix 5-1 for contact information on all of the programs referenced in this chapter).



Photo by Helene Lohman

How do these programs get people in the door? How do they raise the money to keep their doors open? And how do we, the authors of this chapter, who are hundreds, even thousands of miles away, even know these programs exist? The answer is **marketing**, an inherent element in all aspects of an organization, and in all of the chapters of this guidebook. For example:

- A comprehensive and on-going **assessment and visioning** process will facilitate the development of your marketing plan; in fact, the marketing process is a vital element in all program development and planning efforts.
- The development of strategic **funding sources and partnerships** are tied to communicating a strong, clear message about your intergenerational shared site and your services.
- Consideration of marketing issues during the actual **facility design and building** process, like where your programs are located, how the facility and location appeal to your target audiences, and how the design facilitates programming, will greatly improve the success of your marketing efforts and overall program.
- **Staff** and volunteers are key players in developing and implementing marketing plans and should be involved from the beginning.
- Effective marketing plans are built on programs with proven results, and the only way to get those results is through **evaluation**. In addition, marketing campaigns must be continuously evaluated and adjusted based on the results. Perhaps, the most obvious intersection of marketing and evaluation is in conducting market research.

Although marketing has been embraced by some sectors of the nonprofit world, for many nonprofit organizations, it is a new and often misunderstood word. Marketing is often confused with public relations, publicity, advertising and sales. Organizations reluctantly enter marketing as something they **have** to do, while the true benefits of a comprehensive marketing strategy tied to the organization’s vision, mission and strategic plan are unrealized. Marketing does not have to be confusing or complex, and a strategic marketing plan can help an intergenerational shared site accomplish its mission and increase resources. As Gary Stern, author of a number of workbooks on nonprofit marketing, states, “Effective marketing makes things happen—funding increases, an empty hall becomes a human rainbow, on-line volunteers win a crucial

advocacy battle, essential needs are more powerfully met.”¹ This chapter provides an overview of marketing for intergenerational shared site programs including setting goals, positioning the organization, conducting a marketing audit, developing a marketing plan and developing a promotional campaign. While the chapter is not all-inclusive, it is designed to provide an overview of key marketing principles and suggest the basic guidelines for preparing a marketing strategy for intergenerational shared site programs. Although the focus of the chapter is on nonprofit marketing, the strategies are very similar for private, for-profit intergenerational shared sites and can be easily adapted to fit your needs.

DEFINITIONS

The American Marketing Association (AMA) defines **marketing** as “the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods and services to create exchanges that satisfy individual and organizational objectives.”² AMA further defines **nonprofit marketing** as “the application of marketing principles to programs designed to influence the voluntary behavior of target audiences in order to achieve organizational and social objectives by organizations where profit is not the end goal.”³ Although not discussed in this chapter, the term “**social marketing**” is used often in conjunction with nonprofit organizations. For purposes of clarification, AMA defines social marketing as “the application of marketing principles to programs designed to influence the voluntary behavior of target audiences in order to improve their personal welfare and that of society.”⁴ One of the recommendations from Generations United’s National Expert Symposium on Intergenerational Shared Sites and Shared Resources held in 2001 was to “develop a social marketing campaign designed to increase understanding of and interest in these programs.”⁵ Symposium participants agreed that such a campaign would need to be a national effort coordinated by a coalition of organizations.

For the purposes of this chapter, marketing is defined as “the assessment of a constituent need and the management of the response process to achieve best utilization of programs and optimal financial support.”⁶ It is important to understand that marketing is a process. It is not one activity, but a series of activities, all of which can help your organization hone your services and have greater impact.

As mentioned earlier, marketing is often confused with activities like public relations, publicity, advertising and sales. These activities are not marketing; rather, they are considered aspects of promotion—an integral part of a marketing campaign. The following story illustrates the various facets of promotion.

If the circus is coming to town and you paint a sign saying “Circus Coming to the Fairground Saturday,” that’s advertising. If you put the sign on the back of an elephant and walk it into town, that’s promotion. If the elephant walks through the mayor’s flowerbed, that’s publicity. And if you get the mayor to laugh about it, that’s public relations. If the town’s citizens go the circus, you show them the many entertainment booths, explain how much fun they’ll have spending money at the booths, answer their questions and ultimately, they spend a lot at the circus, that’s sales.⁷

APPROACHES FOR MARKETING INTERGENERATIONAL SHARED SITES

There are at least three primary approaches you can take in marketing intergenerational shared site programs. The first one places primary emphasis on the intergenerational nature of the program. The benefits of the intergenerational program are emphasized as wonderful, distinct and unique features of the program. That the program serves two age groups with their own special needs is secondary from a marketing perspective.

The other design is one where the distinct programs are marketed separately, targeting their specific audiences. The program for older adults is marketed directly to them, their caregivers or caregiver referral sources,⁸ while the program for children/youth is marketed to the parents of young people, young people themselves or relevant referral services. This marketing approach focuses on the quality of their individual programs, while also informing its consumer base of the intergenerational aspect of the program and the wonderful benefits to the respective participants. The third design blends the two; marketing both the intergenerational program and the separate age-specific components.

Either model—or the combination of both—can be successful, depending on the message you want to get across to your community and target audiences. For example, Community Programs Center of Long Island in New York uses a mix of both methods. ONEgeneration

in California markets their shared site primarily as a single intergenerational program. Both programs have been very successful with their unique marketing strategies. It is important to keep these perspectives in mind as you are starting your marketing process. You should determine which strategy you intend to take before you develop your plan. However, if the marketing strategy you select does not work, be prepared to revise your plan and try other strategies.

OVERVIEW OF THE MARKETING PROCESS

This chapter follows the steps in the marketing process as identified by Gary Stern in *Marketing Workbook for Nonprofit Organizations*. These steps are: setting marketing goals, positioning the organization, conducting a marketing audit, developing a marketing plan and developing a promotional campaign.⁹ There are a number of other excellent resources on marketing listed in Appendix 5-2 which will provide you with an in-depth exploration of the marketing process, as well as detailed instructions on how to develop and implement your own marketing plan.

Marketing Step 1—Set Marketing Goals:

The first step in undertaking a marketing process is to set your marketing goals. What do you want to achieve? The goals should be specific, measurable and aimed at results. Move beyond the generic “to gain increased recognition, support and status for the organization” to the more specific “to increase participation by 15 youth and 15 older adults in the intergenerational program by the end of the year” or “to recruit 10 parent volunteers by March 1 to help facilitate the intergenerational oral history and mural project.” Marketing goals should always be tied to your organization’s mission. Initially set your sights high, but keep in mind the realities of your work (funding, staff, time, politics, etc). You can and should revise your goals based on the information you gather through the other marketing steps. Keep in mind that, based on your goals, you may not have to complete all of the following steps of the marketing process. Complete only those necessary to achieve your goals.



Photo by Arlene Van De Rijn

Listed below are some sample marketing goals for intergenerational shared site programs:

- An adult day program that shares space with a child care center will enroll 15 older adults in its program by March 1.
- A child care center in an assisted living facility will recruit 20 older adult volunteers by September to assist the teachers in the classroom with the children to broaden the children’s exposure to older adults of different ages and abilities.
- A shared housing facility for frail older adults and young working families will secure 100 new leadership donors for their capital campaign over the next three years.
- A multigenerational community center will recruit 50 teenagers and 50 older adults to attend its Holiday Intergenerational Prom.

Marketing Step 2—Position the Organization:

The second step in the marketing process is to position your organization in your community. Positioning is the process of finding your niche and building your reputation as the organization that fills that niche. Positioning is sometimes referred to as “branding” or

“building the brand.” If your organization is already well-known for doing what you have set forth in your marketing goals to do, then you may not need to spend a lot of time on this step. Although, for the target audience of this publication, it is likely that even if your organization has a strong reputation in your community, it is as a child care provider, a senior service provider or an educational institution, not as a provider of intergenerational care. Positioning is an important step and can be just as valuable for well-established groups as it is for those new to the field. Your organization may have name recognition, but be seen as out of touch with current issues; key groups you are trying to serve or recruit may not know your reputation; or you may be misidentified as one of your potential competitors. An additional marketing challenge and opportunity for some intergenerational shared sites is where two existing organizations collaborate on the intergenerational project. In these instances the organizations need to jointly determine how to position the collaboration in relation to join and separate marketing efforts.

The first activity in this step is developing and testing your positioning statement. The positioning statement differs from your mission statement in that it identifies what the organization wants to be known for, not what the organization does. For example, the mission of Intergenerational Shared Site XYZ is to build and sustain nurturing environments where children and older people flourish. The positioning statement is “Intergenerational Shared Site XYZ wants to be known for leadership and excellence in the emerging field of intergenerational care.” Once the statement is drafted, it must be tested for support. Reach out to different key stakeholders for testing, such as program participants, their family members, board members, volunteers, staff, community leaders, funders or policymakers. Revise your statement based on their feedback.

Once you have your positioning statement, you are ready to work on building your reputation accordingly. The following are some ideas on how to begin to build the credibility of your intergenerational shared site.

- *Do a Good Job!* The best way to build a solid reputation is to provide excellent services that make a difference in the lives of people in your community.
- *Seek Out Opportunities for Conference Presentations.* Conduct workshops or presentations at local, state,

regional and national conferences about your program success or areas of expertise. Generations United convenes an international conference every other year in Washington, DC. There are many opportunities at this conference to speak to an international audience of leaders in the field about your work. The International Consortium for Intergenerational Programmes (ICIP) also holds an international conference on years opposite the Generations United conference. The ICIP conference is always outside of the United States (for more information visit www.icip.info). In addition, look to national, state or regional conferences of your associations. For example, groups like the National Association for the Education of Young Children (NAEYC) and the American Association of Homes and Services for the Aging both hold annual national conferences and have open systems for soliciting presentations. In addition, many state and regional chapters of these associations also hold local and statewide meetings.

- *Join and Take Leadership Roles in Professional Networks.* Generations United is the national membership group for intergenerational professionals, and there are a number of state and local intergenerational networks and coalitions around the country that meet regularly. Visit www.gu.org or contact Generations United to see if there is a network or coalition near you. But it is just as important to build and join intergenerational networks within other professional associations. For example, the National Intergenerational Caucus of Early Childhood Professionals is an official special interest forum of NAEYC. There is also an Intergenerational Peer Group that meets during the Joint Conference of the American Society on Aging and The National Council on the Aging. Consider starting an intergenerational interest/peer group in your association or simply be the voice for intergenerational programs in your meetings. These groups offer wonderful opportunities to establish relationships with other professionals in the field, build national recognition for your program, and learn promising practices from other programs.

- *Establish an Advisory Board/Council* of community leaders, participants or their family members, business leaders and other key stakeholders. In addition to providing guidance, they can raise the profile of your organization.
- *Maximize Media Connections.* Find out who in your local media covers aging and children's issues and introduce yourself. Help them when they ask you about issues not directly related to your organization; they might just come back to you when they need a story or be more willing to listen when you have big news to share.
- *Find Public Opportunities to Speak Up.* When critical issues affecting those you serve come up, consider speaking at public events and hearings. Make sure you name your organization and that your remarks are concise, relevant and on mission. You will most likely also see greater success by remaining non-partisan or bipartisan. Many nonprofit organizations are hesitant to take action on policy issues for fear of losing their 501(c) 3 status. There are, however, a myriad of public education efforts nonprofits can undertake that will not compromise their nonprofit status. (For more information, visit the website for the organization, Charity Lobbying in the Public Interest, at www.clpi.org.)

Keep in mind that an organization's reputation and positioning can not be accomplished overnight. However, by implementing these activities effectively and consistently, the community will begin to see your organization in the context of the positioning statement that you have deliberately designed.

Marketing Step 3—Conduct a Market Audit:

The third step in the marketing process is to analyze your current market readiness and determine what programs, services or activities you may have to change, improve or add to achieve your marketing goals. You should conduct your market audit using "the marketing mix," or the "P"s of marketing (See Table 5-1). There are a number of different numbers and names attributed to these "P"s—for the purpose of this chapter, we are focusing on six "P"s specifically geared to nonprofit organizations.¹⁰ Specifically, the market audit will help you determine if you have the right *Product* for the right people (*Publics*); it will also help you consider what are the other elements of the "marketing mix" (*Price, Place, Production, and Promotion*) you need to reach your marketing goals.

Once you have determined your "P"s, you need to see if they are aligned. For each of the elements, you need to ask yourself two questions . . . What is the "P" and is it in line? This process needs to be completed for each of your marketing goals (See Table 5-1).

Table 5-1: The Marketing Mix—The Six Ps in Nonprofit Marketing¹¹

PRODUCT	What You Offer	What is the product?	Is the product in line? Is it of high quality and does it deliver what people value?
PUBLICS	Target Audiences	Who are your publics/ target audiences?	Are your publics in line? Do you have the right target audiences and know the benefits that are most important to them?
PRICE	What You Ask for the Product	What is your price?	Is your price in line (i.e., not too high and not too low for the value your deliver)?
PLACE	Where the Product is Available	Where is your place?	Is your place in line? Is the product easily accessible to your target audiences?
PRODUCTION	Availability to Meet Demand and Serve Customers Well	What is your production/capacity?	Is your production in line? Can you effectively meet demand and serve customers well?
PROMOTION	What You Do to Convey Your Image and Motivate People to Respond	What is the image you want to promote and what techniques and tools do you use?	Is your promotion in line? Do you convey the right image and use strong techniques that motivate people to respond? ¹²



Photo by Braden S.

For an intergenerational site, the “P”s might look like this:

- **Product:** a full-time intergenerational program with child care and adult day care
- **Publics:** families (parents, adult children, caregivers) in the surrounding area; child care placement & referral services; adult day care placement and referral services; doctors; caseworkers
- **Price:** Child Care per month: 6 weeks to 24 months = \$750; 2-3 years = \$575; 3-5 years = \$475. Adult Day Care per month: \$1,000
- **Place:** co-located at the intersection of two main streets, with ample parking and access to public transportation
- **Production:** Part-time intergenerational coordinator is on staff; the child care and adult day care staff are hired and cross-trained; tested intergenerational activities that work are implemented; greater volunteer involvement from high school and college students, parents and older adults in the community is pursued
- **Promotion:** Image is of high-quality child care and adult day care; accredited; unique because of the added intergenerational benefits; affordable. Techniques

and tools used are brochures, presentations, networking, personal contacts, website and word of mouth

Marketing Step 4—Develop the Marketing Plan:

After setting goals, positioning the organization and conducting the market audit, you are ready to develop your marketing plan. The marketing plan is the set of instructions that you need to follow to achieve your goals. For a new program, your plan will bring together all the elements for a successful launch. For an existing program, your plan will incorporate the strengths of what you currently do with needed changes and improvements. If you are looking at marketing your intergenera-

tional shared site as two separate programs, you will want to start a plan for each; in this case, be sure to bring the separate plans together once they are developed to coordinate efforts. This approach may raise concerns over priorities and resource allocation; therefore, it is important that all relevant staff members are involved in the development as well as implementation phases. Before you begin to write your plan, you should revisit your goals to ensure that they are still accurate based on all the information you gathered through developing your position statement and conducting your market audit.

An important part of developing the plan is determining how you will implement it. Make sure to identify concrete implementation steps with set deadlines, assigned people responsible for each step and associated costs. Also, make sure you have the necessary approval of the plan (from the executive director, board of directors, etc.); this should not be difficult since, ideally, they were involved in the whole process from the beginning.

Using the same model from the marketing audit example, Table 5-2 presents a basic marketing plan for an intergenerational shared site.¹³

To make this marketing plan complete, you would then take the activities listed in the “basic approach” section above, identify concrete implementation steps for each activity, and assign persons responsible, completion dates and associated costs to each implementation step.

Marketing Step 5—Develop a Promotion Campaign:

The final step in the marketing process is developing the promotion campaign. The promotion campaign is the specific means by which you get the word out about your mission and programs. Varying in scale, promotion campaigns include all the ways you communicate with your target audiences in order to create an image for your organization and motivate them to respond in the way necessary to meet your marketing goals. It is particularly helpful to have marketing and communications specialists assist with this process. Many nonprofits have been successful with securing pro bono marketing services or recruiting a marketing professional to serve on the Board of Directors or

marketing committee to offer advice and guidance. It is important to define your desired image and key messages for the campaign. The overall image you select should resonate with all of your target audiences, while the key messages should be developed individually for each of the target audiences. In developing your promotional messages, ask yourself: Who is the target audience? What are the three benefits of your product to this audience? What are the top features and options? What is the call to action? How do they best receive information?

An effective promotional campaign employs a mix of materials and techniques. There are many different options when developing your campaign. They can

Table 5-2: Intergenerational Shared Site Basic Marketing Plan

Goal: To increase overall enrollment in the Intergenerational Program from 30 to 60 older adults within eighteen months.

1. The product is: a Monday-Friday, full-time intergenerational care program with adult day care and child care.		Comments: Needed services in the community.
2. It is being marketed to these target audiences who value particular benefits of the product:		
Target Audiences: Families (parents, adult children, caregivers) in the surrounding area.	Benefits: A safe, loving place that is convenient.	Comments: According to the Partners in Caregiving research, 11% of inquiries are self-generated by caregivers, and 89% of inquiries come from formal referral sources.
Adult day care placement & referral services; doctors; caseworkers.	A high-quality program to which they can refer with confidence.	
3. At this price: Adult Day Care per month - \$1,000		Comments: Discounts or scholarships subsidized by grants and donations.
4. Available at this (these) location(s): Co-located at the intersection of two main streets, with ample parking and access to public transportation.		Comments: Location is convenient for drop off/pick ups; Building design is warm and welcoming: “feels like home.”
5. To effectively meet demand and serve customers well, we will: Increase and cross-train new staff; pursue greater volunteer involvement from high school and college students, parents and older adults in the community.		Comments: Existing partnership with RSVP and community college.
6. The major benefits to promote are: High-quality, accredited child care and adult day care; unique because of the added intergenerational benefits; positive evaluation results.		Comments: Unique to our competition.
Our basic approach to promotion includes: Continue to promote on website (add studies and information on quality intergenerational care to the site) and in community papers and resource directories; personal contact with referral agencies; develop and distribute new brochure; encourage word of mouth referrals from families currently enrolled.		Comments: Images are also powerful.

range from flyers and notices in community newspapers to TV and radio ads, full color posters, billboards, and special events. Select which tools work best for you. You may only use one or two, or more than ten. Whichever you choose, remember to include the most effective tool of all: personal contact.

INTERNAL AND EXTERNAL PROMOTION STRATEGIES

The following sections highlight a number of tips based on the experiences of a co-located adult day care and child care program. Although some of the examples are specific to that site, most of them could be transferable to other intergenerational shared site programs. These tips are divided into two sections. The first section focuses on what we have called internal promotion strategies, or tools, to use within the organization. The second list refers to external promotion strategies, or those used outside of the organization with the public.

Suggestions for Internal Promotion:

Recognizing the fact that a satisfied consumer is a program's best salesperson, you can implement strategies from inside the agency to generate referrals:

- Establish a Referral Incentive Program and place a reminder flyer about the Referral Incentive Program in each family's monthly bill.
- Sponsor caregiver support groups as a way of providing needed attention to the stresses of caregiving, offer support and advice to caregivers by phone, and regularly distribute helpful literature to caregivers.
- Hold family get-togethers at different times of the year to provide opportunities for bonding and support.

*"ONEgeneration has developed a number of successful marketing strategies and community outreach activities that attract goodwill and revenue to the organization and expand their visibility both locally and nationally. Their annual events include a One-Mile Intergenerational Walk and the Intergenerational Fashion Show, Luncheon and Silent Auction. The Walk started seven years ago, and attracted approximately 1,500 participants and a number of corporate, institutional and private sponsors in 2003."*¹⁴

- Conduct Customer Satisfaction Surveys on a semi-annual basis to gather feedback, then use this information in promotion materials in the form of testimonials.
- Provide in-service training for all staff members in positive customer relations techniques.
- Publish an *Elder Care Gazette* newsletter on a quarterly basis.

- Meet with staff to explain why program enrollment is so important to the financial success of the program, and then train them on how to recruit from among participants' families, friends, neighbors, places of worship, etc.
- Provide a financial incentive to staff who recruit enrollees to the program.
- Provide a financial incentive to current customers who recruit enrollees to the program.
- Recognize staff and current customers who recruit children/elders in the center newsletter and memos. Send them thank you letters.

Suggestions for External Promotion:

- Create a Board/community marketing committee.
- Identify an experienced marketing professional to serve on the committee.
- Create an Elder Care Program Advisory Committee with a doctor, social worker, home health care representative, etc.
- Reach out to clergy and geriatric professionals with respect to the elder care component of the program.

- Design brochures that are specific to elements of your program (e.g., a brochure that describes your services for Alzheimer's; another brochure for the frail elderly, etc.).
- Produce an attractive logo.
- Produce and place an attractive sign in front of the center.
- Become accredited by the relevant accrediting bodies (see *Chapter 1: Visioning and Assessment*) and include your accredited status in your marketing and promotion plans (e.g., send out a press release, include on all materials, hang prominently in the building and make sure referral sources know of your status).
- Employ a Community Outreach Specialist whose sole assignment is to regularly visit the offices of internists, pediatricians, geriatricians, social workers, discharge planners, financial planners, elder law attorneys, hospitals and other agencies, as well as senior organizations, senior housing complexes, churches, libraries and other community organizations. The purpose of these visits is to establish relationships with gatekeepers and professionals, distribute agency literature and schedule speaking engagements with the professional staff.
- Conduct ongoing monthly support group meetings during day, evening and weekend hours among caregivers.
- Generate relationships and enrollments with employee assistance programs, retirement groups of larger employers, convents, labor unions (e.g., teachers, police and hospitals) and larger elder law firms.
- Establish a strategic partnership with a major elder law firm to join forces in marketing elder legal and support services at discounted rates to employers.
- Insert an ad in the Yellow Pages through placement in sections titled: Adult Care Facilities; Assisted Living-Elder Care Facilities; Alzheimer's Help Groups; and Day Care Centers; also advertise in their online directory.
- Produce a 60-second promotional videotape for airing on Cable TV.
- With the assistance of a public relations firm, secure ongoing local and regional media exposure.
- Conduct presentations with trade associations, women's organizations and senior citizen groups.
- Stage events on a monthly basis such as "big band" dances, talent shows with comedians, song stylists, dance troupes, etc., and secure local and regional media exposure for these events.
- Recruit and retain media personality to represent the program on TV, radio and print advertising.
- Promote and conduct elder care educational seminars.
- Negotiate agreements for discounted adult day services with local businesses and unions.

CONCLUSION

Intergenerational shared sites serve and provide needed care to children, youth and older adults across the country, and their popularity is increasing. One of the wonderful benefits of these programs is that their unique features can attract additional funding sources, increased participants and new volunteers; these features can also act as a positive promotional tool, but only when marketed effectively. The marketing process described in this chapter must be a sustained endeavor. You must evaluate the progress and results of your efforts throughout process and be prepared to make any necessary changes. With reflection, adjustment and time, your marketing efforts will only become more powerful.

Photo by Cindy Craig



- ¹ Stern, G.J. (with Centor, E.). (2001). *Marketing Workbook for Nonprofit Organizations Volume I: Develop the Plan (2nd Edition)*. St. Paul, Minnesota: Amherst H. Wilder Foundation, p. 3.
- ² Retrieved January 2005, from www.marketingpower.com/mg-dictionary.php
- ³ Ibid.
- ⁴ Ibid.
- ⁵ For more information on the recommendations from this symposium, see Generations United. (2002). *Reaching Across the Ages: An Action Agenda to Strengthen Community Through Intergenerational Shared Sites and Shared Resources*. Washington, DC: Author.
- ⁶ ARCH National Resource Center for Respite and Crisis Care Services. (January 2002). *ARCH Factsheet Number 7: Marketing for Charitable Nonprofit Organizations*. Washington, DC: Author.
- ⁷ Retrieved January 2005, from www.mapnp.org/library/ad_prmot/defntion.htm
- ⁸ Both the practical experience of adult day service programs and related research have shown that formal referral sources are, by far, the greatest means of reaching caregivers and generating program participants. According to the Partners in Caregiving research, 89% of inquiries come from formal referral sources and 11% of inquiries are self-generated by caregivers.
- ⁹ Stern, G.J. (2001).
- ¹⁰ Ibid.
- ¹¹ Ibid, p. 9.
- ¹² Ibid, p. 58-71.
- ¹³ The marketing plan is based on a template developed by Stern, G.J. (2001).
- ¹⁴ Hayden, C.D. (2003). *Financial Analysis & Considerations for Replication of the ONEgeneration (ONE) Intergenerational Daycare Program*. Oakland, California: National Economic Development and Law Center, p. 6.



Photo by Jayne Hafer

Appendix 5-1 Contact Information for Programs Discussed in this Chapter

Hope Meadows – Generations of Hope

1530 Fairway Drive
Rantoul, IL 61866
217-893-4673
<http://www.generationsofhope.org/>

Grandma's House at Westminster Care Orlando

830 West 29th Street
Orlando, Florida 32805
407-843-3230
<http://www.westminsterretirement.com/grandmas-house>

Grace Living Center – Jenks

7111 North 5th Street
Jenks, OK 74037
918-299-8508
<http://gracelivingcenters.com>

Generations – Heritage Day Health Centers

3341 East Livingston Avenue
Columbus, OH 43227
614-236-0586
<http://www.heritagedayhealth.org/>

Lasell Village

120 Seminary Avenue
Newton, MA 02466
617-663-7000
<http://www.lasellvillage.com/>

ONEgeneration

17400 Victory Boulevard
Van Nuys, CA 91406
818-708-2345
<http://www.onegeneration.org>

The Community Programs Center of Long Island

141 Rodeo Drive
Edgewood, NY 11717
631- 586-4020
<http://www.cpcli.org/>

Appendix 5-2 Marketing Resources

Books:

- Andreasen, Alan & Kotler, Philip. (2002). *Strategic Marketing for NonProfit Organizations* (6th Edition). New York: Prentice Hall.
- Bonk, Kathy, Griggs, Henry, & Tynes, Emily. (1999). *The Jossey-Bass Guide to Strategic Communications for Nonprofits*. San Francisco: Jossey-Bass Publishers.
- Drucker, Peter F. (1990). *Managing the Non-Profit Organization*. New York: HarperBusiness.
- Drucker, Peter, F. and Gary J. Stern. (1999). *The Drucker Foundation Self-Assessment Tool*. Jossey-Bass Publishers.
- Stern, Gary J. (2001). *Marketing Workbook for Nonprofit Organizations Volume I: Develop the Plan*. (2nd Edition). St. Paul, MN: Amherst H. Wilder Foundation.
- Stern, Gary J. (1997). *Marketing Workbook for Nonprofit Organizations Volume II: Mobilize People for Marketing Success*. St. Paul, MN: Amherst H. Wilder Foundation.

American Association of Homes & Services for the Aging Publications:

The following publications, as well as other resources on marketing senior housing, are available from the American Association of Homes & Services for the Aging at www.aahsastore.org.

- AAHSA. (October, 2003). *Creating Consumer-Friendly Marketing Materials*. Washington, DC: American Association of Homes & Services for the Aging.
- Brecht, Susan B. (2002) *Analysing Senior Housing Markets*. Washington, DC: American Association of Homes & Services for the Aging.
- Ehlers, Janis (2002). *Marketing Seniors Housing*. Washington, DC: American Association of Homes & Services for the Aging.

National Adult Day Services Association Manuals:

The following manuals, as well as other resources from the Partners in Caregiving project, are available from

the National Adult Day Services Association. For more information, visit http://www.nadsa.org/train_edu.htm.

- *Marketing Adult Day Programs: Targeting Caregivers to Reach Participants* by Greg Newton and Rona Smyth Henry.
- *Referral Source Marketing for Adult Day Programs* by Greg Newton and Rona Smyth Henry.
- *Marketing Adult Day Services to Business and Working Caregivers* by Greg Newton.
- *Special Marketing Issues for Adult Day Programs* by Greg Newton.
- *New Customers for Adult Day Centers* by Greg Newton.

Marketing for Children and Youth Programs:

The following resources on marketing programs for children and youth are available:

Ballasy, L. (November, 2004). *Marketing for the Recruitment of Mentors: A Workbook for Finding & Attracting Volunteers*. Portland, OR: Northwest Regional Education Laboratory. Available on-line at www.nwrel.org/mentoring/pdf/marketing.pdf.

Web Resources:

- American Marketing Association, www.ama.org
- Charity Lobbying for the Public Interest, www.clpi.org
- Generations United, www.gu.org
- Leader to Leader Institute (formerly The Peter F. Drucker Foundation for Nonprofit Management), www.leadertoleader.org
- The Management Assistance Program for Nonprofits, www.mapnp.org (for their specific pages on marketing, visit www.mapnp.org/marktng/mrktng.htm)
- Social Marketing Institute, www.social-marketing.org

Chapter Six Curriculum Development and Intergenerational Activities

By Shelley Z. Levin, M.Ed.

INTRODUCTION

Up until this point, this guide has focused on assessing your community and creating a vision for your intergenerational shared site; how to find the funding to support your program; what you need to do and consider when building an intergenerational shared site; what can be done to prepare, train, and retain staff to work in your programs, and how to market your shared site. This chapter focuses on what happens once the younger and older participants are in the door – how to develop curriculum and intergenerational activities to improve outcomes for younger and older people.

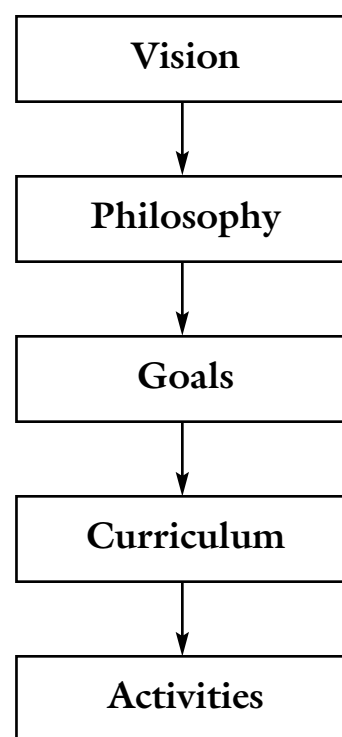
The curriculum development and intergenerational activities in a shared site must be based on the vision, philosophy and goals for the program. The agency goals are achieved by defining a curriculum and implementing activities accordingly. It is important that the curriculum enhance lifelong learning and foster meaningful relationships among all ages. For the purposes of clarity, definitions of the following terms discussed in this chapter are presented below:

- **Curriculum** is a plan by which the agency or program achieves its goals and realizes its vision.
- **Activities** are the steps that program staff, such as teachers, activity directors, project coordinators, etc. structure so that individual and program goals are accomplished.

This chapter will provide an overview of the relationship between vision, philosophy, goals and curriculum; describe key points to consider when developing curriculum; explain how to plan the curriculum; and suggest ways to maximize informal curriculum. Three case studies will also be presented. Also provided are a valuable list of resources on intergenerational curriculum, program development, and activities (Appendix 6-1) and a sampling of intergenerational activities (Appendix 6-2).

RELATIONSHIP BETWEEN VISION AND CURRICULUM

To understand the relationship between a program's curriculum and its vision, philosophy and goals, consider the following graphic depiction:



The vision of what an agency or program is going to look like is a mental picture. The vision is realized by practicing a kind of philosophy. This philosophy, which represents how the goals will be pursued, lends the culture or value system that guides all the steps toward realizing the vision. Goals, in turn, outline what a program aspires to accomplish. Goals are accomplished through the implementation of the curriculum, or the subject to explore . . . to “get to know.” The curricular activities are the instruments that help staff assess cur-



Photo by Cleone Mocik

riculum and participants' proximity to achieving anticipated goals. Curricular activities are, thus, the day-to-day, structured interactions through which participants of all ages are encouraged to learn and develop.

KEY POINTS TO CONSIDER WHEN DEVELOPING CURRICULUM

The main goal of an intergenerational shared site is to foster relationships. With this in mind, the following key points should be taken into consideration when developing the curriculum:

- The developmental capabilities of the participants:
 - Exactly what kind of physical movement/coordination, memory and degree of supervision are required to accomplish an activity?
- The interests of the participants:
 - What do the older adults and the children/youth enjoy doing separately and together?
- The physical design of the facility:
 - How much space indoors and outside is available and accessible for activities?
- The familiarity of practices and/or modalities that are also consistent with the agency's mission:
 - What kind of time is allocated for staff to plan curriculum and activities for the participants?

- What kind of paperwork is required for agency, health and/or regulatory requirements?
- The structuring of activities (activities will be structured according to opportunities, typically formal/planned and informal/unplanned):
 - What are the goals and expectations for **how often** (daily? weekly?), **where** (in the living room?) and **in what way** participants will interact according to a specific schedule (e.g., art activities at 10:00 a.m.)?
 - What specific materials will be necessary for the planned activities? For example, if the activity is cooking stone soup, prepare a list of ingredients, such as measuring cups, spoons and a large soup pot. Agree on who will bring which items, and from where they may be provided, as well as whose job it is to clean up afterwards.
 - What kind of casual opportunities in time and space are accessible to participants to interact, without specific planning? (For example, children play outside as older adults take walks and sit on benches amongst the children. Children gather in the adults' living room area for music and dance, where the older participants might be sitting, playing cards or joining in the songs.)
 - Is communication among all staff clear and routine? It is imperative that the right days, times and places are formally acknowledged in advance. Shared and circulated calendars work well for this critical element. Even "spontaneous interactions" have to be guided.

PLANNING THE CURRICULUM

Curriculum design, framed by the program's goals and objectives, needs to be driven by the staff. Just as the success of an intergenerational relationship between young and old is contingent upon their opportunities to interact, it is similarly true that the success of the curriculum is contingent on the ability of staff to interpret and expand participants' ideas and interests.

Good curriculum is planned by well-trained staff. The most successful shared site intergenerational programs are those that value the ongoing input of the professional and paraprofessional staff from inception, to curriculum planning, and through evaluation. Once the staff is oriented to the vision and goals of the agency, they need autonomy to design and implement curriculum that they know will be most meaningful to the partici-

pants. It is the staff who are the first-line workers and who develop understanding of the personalities and interests of those in their classrooms and groups. Staff initiative and creativity will be undertaken with guidance and support, as well as leadership, from the Intergenerational Program Coordinator. When it is not possible to have an Intergenerational Coordinator, it is appropriate to assign responsibilities to various staff members to ensure smooth operation of the program. Sometimes these tasks are assigned to teams of staff, such as arranging for needed supplies and materials, space use, and communication within and outside of the agency. The best curriculum is developed and implemented in a climate of observation, reflection and collaboration among the staff, the coordinator and the community of participants.

There are, as previously noted, two aspects of curriculum that need to be addressed in structuring activities in a shared site intergenerational program:

- formal or planned activities and
- opportunities for informal or casual interactions.

For both types of activities, it is critical that staff assess the capabilities and needs of the participants, identify their interests and develop the means to create, invite and support the activities. In both cases, the staff must ensure that every activity has a beginning, a middle and an end. A special greeting—a handshake, a song or eye contact with a wave and a smile—can begin and end interactions. This “bookend” approach to activities is essential to the success of the interactions.

SAMPLE CURRICULA

Some examples of models for shared site intergenerational programs with formal curricula are:

1. Outside-of-school-hours program in a senior or community center,
2. Child care center in a long term care facility, and
3. Home sharing.

As previously stated, the curriculum is the concept that the group explores together, and the activity is how the participants will “come to know” that concept in a pragmatic way. The objective, or the specific and measurable task that the group expects to accomplish, then becomes a means to evaluate the criteria and judge

if a goal is met. The ultimate goal for intergenerational shared site programs of fostering meaningful relationships among all ages is intangible. Some of the best measures of such an intangible goal are to study the frequency of voluntary participation or attendance, and the general health of the participants.

Case Study 1—Involvement in a Local Election:

An inner city outside-of-school-hours program is housed in a community senior center. The staff listen to conversation among the older adults and the youth as they discuss an upcoming local election. Knowing the seniors have sustained an interest in civic engagement, and hearing the children ask questions and comment about the candidates, the staff join in the discussion and facilitate making a plan for the program participants to get involved in an election activity.

The curriculum in this case is the civic engagement. This curriculum includes an organized series of tasks that involve publicizing the event, securing space in the community center and getting required training for the seniors to register the voters. Together, the children and some of the older adults compose the letter to request the space and the schedule, and they generate the publicity materials.

Photo by Grace Preder



The main activity for the curricular goal is “voter registration.” The objective, or expected outcome, is to get 200 eligible voters registered before the election. There are, as with most curricular plans, secondary goals and objectives, as well as the primary ones. In this example, the children and some of the adults learn about the Electoral College, requirements for residency, citizenship, age and other criteria for eligibility to vote in the United States election. Children, especially those for whom language and literacy are challenging, will benefit from researching the project and visiting the library and the internet. Older adults might learn how to do a web search, assisted by a younger mentor.

The staff guide participants in assessing the progress of meeting the goals and objectives. A valuable assessment tool that the participants might use is to write an article for the community center newsletter or a local paper, describing what the group accomplished (*how many voters were registered*), how they went about pursuing the project (*steps in the process*), and what they learned (*some specifics of what they learned in the process*).

Notably, this curriculum exemplifies the situation of observant staff using program participants’ ideas to lead curricular plans. Ideally, most of the planned curricula emerges from such interest, thus fostering motivation by participants to engage in the project and accomplish the curricular goals. This concept is known as **emergent curriculum**, an approach that enhances self-esteem and promotes learning. Each intergenerational shared site program, then, implements curriculum uniquely, rather than using a “cookie cutter” approach that might limit creativity and growth.

Photo by Mary Beth Burkholder



Case Study 2—Understanding the Life-Cycle:

One of the most common ideas for an activity for pre-school age children and frail seniors who are in long-term facilities is to focus on demonstrations of life-cycle. While this aspect of curriculum is popular and generally appropriate, it is one that needs to be implemented in ways that are relevant and meaningful to very young children.

As children observe the changing of leaves and the cooling of temperature, they are taking notice of their relevant world. It is in that concrete, immediate and very personal relevance to a child that the otherwise mundane becomes something new and exciting. Thus, touching and collecting leaves that are dried up and cracking while comparing them to new, green leaves helps them relate to the comparison between the wrinkled skin on an old hand and the smooth skin on their own. In this example, the life-cycle is the curriculum, and collecting and comparing leaves and hands are the activities. An assessment of this curriculum might be graphing children’s reactions on chart paper to review and examine what they did and what they learned. For the seniors, the assessment might include a case note of the number of minutes of time they remained alert while engaged with the children in the activities.

A word about “cookie cutter” activities must be noted. While the ideal curriculum is “emergent” and unique to each program, some practitioners argue that “cookie cutter” activities sometimes provide seniors and children a familiarity that creates a zone of comfort in which they feel safe to take risks and show initiative to get involved. At the very least, such activities can serve as a spring-board for newly-formed intergenerational groups.

Life-cycle activities such as these are relevant to young children’s perspective. However, it is important to include in the curriculum plans some older adults that are mentally sharp and physically mobile so that children grasp the concept of lifespan as a continuum, and not as a dichotomy of old versus young. Just as educators promote inclusion of children who exhibit a wide range of developmental abilities, it is also important to approach an intergenerational shared site curriculum with similar sensitivity.

Case Study 3—Shared Living Arrangements:

In some situations, older adults and youth share a residence. Often, the younger adults and/or youth gain the benefit of reduced living expenses in exchange for providing support to the older adults in health care,

shopping, transportation and/or home maintenance. Homeshare International (www.homeshare.org) demonstrates curriculum in a way that is defined by the physical plant and the living arrangement between older and younger adults. It is an ideal structure that can optimize the possibilities for interactions, since everyone lives in the same space and is required, by definition, to

interact with their housemates. In this example, residents go so far as to enter into a contract to share responsibilities for mutual benefit.

The following chart summarizes the curriculum components for each of the previous intergenerational shared site case studies:

MODELS OF INTERGENERATIONAL SHARED SITE PROGRAMS	FORMAL CURRICULAR GOALS	CURRICULAR ACTIVITIES	CURRICULAR OUTCOMES	INFORMAL/UNPLANNED CURRICULUM
Outside-of-school hours in senior community center	Civic engagement	<ul style="list-style-type: none"> • Register 200 voters • Request space • Develop promotional materials • Get seniors trained to be registrars 	<ul style="list-style-type: none"> • 203 new voters registered • Seniors trained as registrars • Letter of request written for space • Publicity developed • Ads distributed or posted. 	<ul style="list-style-type: none"> • Youth learn about Electoral College, read and contribute to the community. • Youth are in safe, healthy and meaningful environment. • Older adults contribute to the community. • Older adults learn how to do an online search. • Older adults serve as surrogate grandparents for some children, fostering mutual self-esteem and value.
Child care in long term care facility	Life-cycle awareness	<ul style="list-style-type: none"> • Experience differences in leaves • Experience differences in skin on hands • Include cognitively astute and physically active older adults 	<ul style="list-style-type: none"> • Touch and collect dried and living leaves • Touch and compare skin on hands • Graph information • Cognitive faculties are stimulated • Children's attitudes toward aging is accepting and matter-of-fact, rather than negative 	<ul style="list-style-type: none"> • Relationships and interaction among children and all adults is fostered. • Older adults serve as surrogate grandparents. • Sense of worth and self esteem are heightened for all.
Home Sharing	Mutually-beneficial living arrangement	<ul style="list-style-type: none"> • Contractual agreement of living quarters for household and/or resident maintenance 	<ul style="list-style-type: none"> • Older adults are cared for in a desirable living arrangement • Youth have desirable living quarters and remain in home for x months. 	<ul style="list-style-type: none"> • All residents encourage and experience a familial quality to their living arrangement.



Photo by Pam Waltz

MAXIMIZING INFORMAL CURRICULUM

Informal curriculum is based on how staff plan the environment, the activities and the daily schedule for all participants. Other aspects of fostering frequent and meaningful informal curriculum include benefits and limitations of facility design; adequacy of appropriate materials and supplies; regulatory and accreditation issues; and interpersonal dynamics.

Well-trained intergenerational program staff will identify and embellish the strengths of a physical plant, recognize and comply with regulatory and accreditation issues, and dedicate themselves to requesting the materials and supplies that will optimize the curriculum and, therefore, promise the most meaning to the program participants. It is through their education and training about “best practice” that they recognize and implement plans that reflect sound judgment and optimal program enhancements.

The climate of collaboration and collegiality among participants and staff plays a crucial role in the frequency and quality of informal interactions, the degree of their influence on the overall program goals and, therefore, on the relationships that can develop among all ages. Routine and frequent meetings to assess individual progress, evaluate the success of activities and plan subsequent curricula are crucial aspects of building and

maintaining strong collegiality among staff. Shared responsibilities and supportive guidance and supervision also lend to the climate of collaboration. The relationships are the cornerstone of a strength model of intergenerational shared sites. A corps of competent and dedicated professional staff approach participants for what they can do, and not for what they cannot do (i.e., a deficit model).

It is through the ongoing planning and assessment among all program staff that curriculum is developed in such a way that it has meaning to all participants’ cognitive, emotional, social and often physical growth and well-being. Awareness of times of the day when children and older adults are present and accessible lends to the caregivers, teachers and other staff “windows of opportunity” for conversations, stories, visibility and other kinds of interaction between the younger and the older program cohorts. These coincidental interactions are generally possible because of proximity and familiarity, both of which are heavily dependent on staff awareness and encouragement.

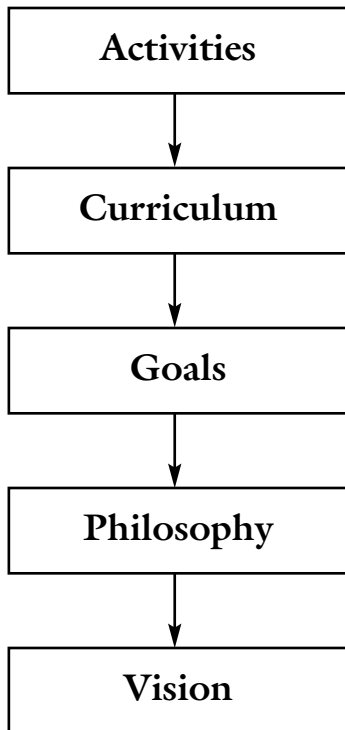
CONCLUSION

While the inherent goal of all intergenerational shared site programs is to foster meaningful relationships among older people and children/youth, it is crucial to the success of the agency that sound principles of curriculum are part of the agency infrastructure, as are staff training and development, funding and other key aspects of operations.

Curriculum is based on well-trained and empowered staff that assess and develop curricula as interests emerge from program participants and the interactions among them. Their access and ability to understand the participants; their sensitivity to the individuals in the program as “whole” people, having needs, desires, skills and interests; their creativity in arranging space and obtaining materials; and their knowledge of the vision, philosophy and goals of the agency ground staff to capably design and implement successful curricula.

How the administration regards staff and how staff regard program participants reflect the values embedded in the program philosophy. It is the valuing of human resources—both the staff and the participants for whom they implement curricula—wherein quality of program

and, thus, quality of life lead to realizing the agency's vision. The converse diagram is a test of the originally discussed one earlier in the chapter. If reversing the reasoning holds truth, it ensures a degree of curricular success:



Curricular activities lead to deepened knowledge of a subject and of relationships. The deepened knowledge means a program goal has been met. How the goals are articulated reflect the philosophy. The philosophy is the value system that guides the path to realizing the agency vision. Successful curriculum, deepened relationships and enhanced quality of life for program participants create success for the agency.



Photo by Josephine Heitzman

Appendix 6-1 Resources

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Appendix 6-2 Sample Intergenerational Activities

Many ideas that work well for children can be modified to work well for an intergenerational group. When planning an activity, keep in mind the older adult population you are working with and the age of the children. Remember to adapt each activity appropriately to their needs. The possibilities for intergenerational activities are limitless. Here are a just a few ideas of programs that can be adapted for intergenerational shared sites.

Writing/Reading Activities

- Older adult reading to child
- Child reading to an older adult
- Creative writing projects
- Group discussions
- Pen Pal program
- Life story interviews
- Storytelling
- Tutoring

Games

- Bingo
- Bowling
- Cards
- Dice-Bunco, 10,000
- Horseshoes
- Parachute
- Ring Toss
- Puzzles- Crossword/Jigsaw/Hangman
- Scrabble
- Wheel of Fortune
- Flip

Cooking/Baking

- Bake Sale
- Edible Crafts
- No bake cookies
- Plan a meal
- Pudding Painting
- Sharing favorite recipes
- Pizzas
- Pretzels
- Write your own recipe

Gardening

- Flower arranging
- Planting Flowers/Vegetables
- Planting Seedlings

Playing in the leaves/raking/leaf prints

Holiday Ideas

- Decorate bulletin boards
- Decorate Christmas trees
- Decorate Easter Eggs
- Ice Cream social
- Make Christmas Ornaments
- Make Halloween masks
- Make holiday cards
- Table Favors
- Valentine Tea
- Have a traditional Thanksgiving Dinner
- Grandparents Day social
- Harvest Festival

Celebrate

- Week of the Young Child (April)
- Volunteer Week (April)
- National Nursing Home Week (May)
- Intergenerational Week (May)
- Older Americans Month (May)
- Make A Difference Day (Oct)
- Friendship Day (Dec)

See Generations United's Intergenerational Calendar for more ideas.

Music

- Games and Exercise to Music
- Sing-A-Long
- Music Therapy, Drumming circle
- Intergenerational Choir
- Make Musical Instruments

Field Trips

- Bowling
- Christmas Light Tours
- Dances
- Apple Picking
- Flower Gardens
- Library
- Museums
- Parade
- Picnics
- Pumpkin Farm
- TV/Radio Station
- Zoo

Developed by Robyn McBroom & Carol Havlovic, Revised by Carrie Ann Hill.

Chapter Seven Evaluation

By Shannon E. Jarrott, Ph.D.

INTRODUCTION

Amazing opportunities exist at shared site intergenerational programs. Strong relationships emerge; social, developmental, educational and physical needs are met; and innovative staff development and program opportunities are provided. Yet, without evaluation, replication, education and marketing opportunities based on these successes are limited. Evaluation serves multiple purposes, takes many shapes and sizes, and involves a broad range of shared site community members.

This chapter is divided into two sections. The first section addresses key questions regarding conducting evaluations of shared site intergenerational programs: *why, when, who* and *what*. The second section describes practical considerations and promising practices with illustrative examples from intergenerational programs and evaluations. The appendices provide sample evaluation items and a list of evaluation resources. Because published evaluation research of shared site intergenerational programs is extremely limited, the chapter incorporates material from non-shared site intergenerational programs, as well as general evaluation principles. By synthesizing theory, research methods and findings from these varied sources, the chapter provides practitioners and evaluators with a toolkit for developing evaluation methods appropriate for their unique shared site intergenerational programs.

SECTION 1: OVERVIEW AND KEY EVALUATIVE QUESTIONS

Evaluations can be conducted on small or large scales and should be implemented at each shared site program. Program administrators may conduct evaluations on their own and/or contract with external evaluators. Evaluations need not be expensive or time consuming, but they must be conducted. By developing and standardizing evaluation techniques for shared site intergenerational programs, practitioners and evaluators enhance the state of the art, increase opportunities to improve and sustain shared site intergenerational programs, and, most importantly, achieve program goals. For example, at a shared site program with minimal interaction among clients, the initiation of an intergenerational program with evaluation components

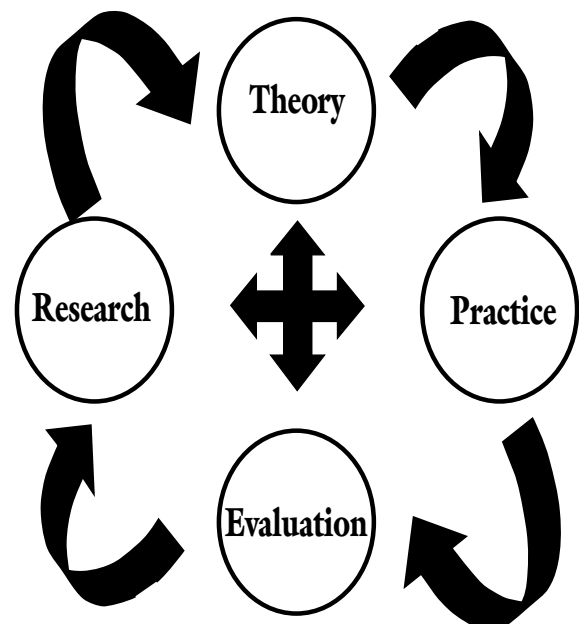
resulted, over a three-year period, in the creation of an intergenerational site manual, a shared intergenerational mission, cross-training for adult and child care staff, summer intergenerational programming, and an increase in programming from less than one intergenerational opportunity each week to two each day.¹

Guiding Questions:

Why evaluate?

At a historical time when human service programs face budget cuts and increasing client populations, administrators may resist devoting resources to evaluation. And yet, evaluation becomes ever more critical as belts tighten and practitioners are expected to do more with less. Lavee and Dollahite proposed a *feedback loop* (see Figure 7-1) in which research, practice, evaluation and theory cycle continuously to inform each other.² Exclusion of one element in the model negatively affects all other elements. Utilization of a feedback loop yields important information, such as the sources of success or problems experienced at a program. Resultant evaluation outcomes can then inform positive programmatic change.

Figure 7-1: Theory-Research-Evaluation-Practice Feedback Loop³



According to Lavee and Dollahite, evaluation results, in addition to theory- and evidence-based practices, should inform program development.⁴ Knowledge that a program occurs at an intergenerational shared site does not yield a detailed picture for clients, practitioners or policy makers. Additional information is needed to inform stakeholders of the rationale, objectives and intended outcomes of the shared site program.⁵ Evaluation data can provide this information, which in turn can support efforts to sustain, enhance and replicate programming.

Employing ongoing evaluation techniques permits watchful administrators and staff to spot problems early on and remedy them.⁶ Further, professionals can identify benefits and take steps to sustain and replicate program strengths.⁷ Such evaluations provide insight into questions about why a program is or is not operating successfully. By demonstrating program effectiveness, or making changes necessary to achieve program effectiveness, programs increase their sustainability as well as their chances of securing new funding.

Funding may be secured, justified or continued contingent upon evaluation efforts. Goyer and Zuses identified funding of intergenerational shared sites as a challenge.⁸ Currently, practitioners and researchers report that the challenge remains, both in the United States and internationally.⁹ Evaluation is increasingly part and parcel of funding, whether funds contribute to program development, program enhancement or research efforts.¹⁰ Practitioners and researchers have successfully used evaluation findings to justify the continuation and replication of intergenerational programs.¹¹

Evaluation findings power the marketing of successful shared site intergenerational programs. Results may be shared in research and trade journals, popular press and advertising materials. For example, the ONEgeneration (ONE) includes research papers in its packet of information given to board members, potential contributors and community partners. ONE also refers to their evaluation findings in interviews with newspaper and magazine journalists. The findings highlight unique opportunities found at shared site intergenerational programs and emphasize the positive qualities of their programs. Too often, shared site intergenerational programs operate successfully in a vacuum, with little dissemination of the innovative qualities of their organization. Valerie Kuehne aptly described a

responsibility of intergenerational shared site program staff: “All human services workers should feel obliged to disseminate.”¹² Without evaluation and dissemination of evaluation findings, every shared site intergenerational program faces its own version of reinventing the wheel as administrators and staff develop, implement and modify their program.

When to evaluate?

The most effective organizations employ evaluation techniques even before a program opens.¹³ For shared site intergenerational programs in the planning and development stage, needs assessments identify characteristics and requirements of potential clients and inform program development. New and established shared site intergenerational programs utilize varied evaluation formats over the course of a program’s operation. The systematic use of theoretical and practice models should inform the timing and nature of evaluation efforts.¹⁴ Theory informs the selection of outcomes to measure and, thus, the evaluation tools to assess these outcomes. Evaluation and program models guide evaluators to elements of a program to be assessed (e.g., physical space or level of activity), informants in an evaluation (e.g., parents or program staff), and even the timing of evaluation. For example, if a developmental theory leads evaluators to believe that intergenerational contact will have long-term effects on a child’s social skills, longitudinal evaluation over several years would be appropriate. There are three types of evaluations that may be utilized at specific times by shared site program administrators: formative, program monitoring/process and impact.

Formative evaluations should be initiated in the early stages of a shared site intergenerational program or intervention. Programming may be tested, thus allowing staff to work out the “kinks” of a program early on.¹⁵ Additionally, evaluation methods may be piloted and modified accordingly. For example, a shared site intergenerational community center might conduct a focus group with a panel of young people and a panel of older adults about the proposed physical layout of the center and the calendar of events proposed. Follow-up surveys may be gathered in the early weeks after the program opens to see how participants respond to the new opportunities. Formative evaluations contribute to the success

of ongoing and subsequent programming efforts by obtaining insight early on to the potential benefits, challenges and requirements for a successful program.

Program monitoring and process evaluations are commonly employed by human services staff who track program coverage and program delivery. Program monitoring at shared site programs may be conducted periodically (e.g., annually) or may represent an ongoing effort to determine the degree to which participants are engaging in available intergenerational opportunities. Gathering information on the degree to which a service is provided and how the service is provided contributes to evaluators' understanding of a program's impact. Too often, evaluators engage in "black box" research in which they examine the impact of a program without knowing the degree to which the intervention or program was delivered to clients.¹⁶ Program monitoring helps to explain why a program yielded a positive, neutral or negative effect. For example, if impact evaluation data (described below) indicated a positive effect of intergenerational contact for only some of a shared site program's clients, evaluators would want to know the level and nature of intergenerational contact experienced by the different clients. This process information could help explain why some individuals but not others experienced positive outcomes as a result of the intergenerational contact.

Impact evaluations provide an estimate of the effects of program outcomes.¹⁷ They may be conducted after a program ends or after significant exposure to a program. Consequently, impact evaluations entail a comparison between conditions in which a program or intervention is offered and conditions in which it is not. For example, evaluators from a shared site intergenerational program at a nursing home with a child care center might compare empathy among 3-year olds at the intergenerational program and a similar group of 3-year olds attending a non-intergenerational program. Alternately, evaluators may conduct repeated measures with the same evaluation instruments to determine program or client characteristics before and after the introduction of an intervention or program. Impact evaluations contribute valuable information to shared site intergenerational programs interested in identifying the unique outcomes of intergenerational compared to non-intergenerational programs. Pre- and post-



Photo by Bob Walcher

comparisons also support efforts to determine the value of a new program or program element.

Who evaluates?

Program administrators debate the value of external evaluation conducted by outside researchers or consultants compared to evaluations conducted internally by program staff. Instead of debating the superiority of one over the other, programs should consider the unique value afforded by each. Many evaluation efforts are accomplished using skills that program staff and administrators exercise daily in operating and documenting their program.¹⁸ Inclusion of staff in the evaluation process can also increase staff investment in the program and enhance the sustainability of a program.¹⁹ Additionally, some data collection efforts may be enhanced when conducted internally by persons familiar with program clients. For example, Dementia Care Mapping guidelines specified that observers should use their knowledge of the persons with dementia being observed in coding their affect.²⁰ Evaluation tools that rely on in-depth knowledge of individual program members lend themselves to use by internal evaluators.

At the same time that internal evaluators can strengthen assessment efforts, internal evaluations face considerable risk of bias. Internal evaluators may focus on positive outcomes and overlook negative aspects identified in the evaluation. Conversely, an internal evaluator invested in terminating a program component or staff member may exaggerate evidence of negative outcomes while minimizing positive elements.

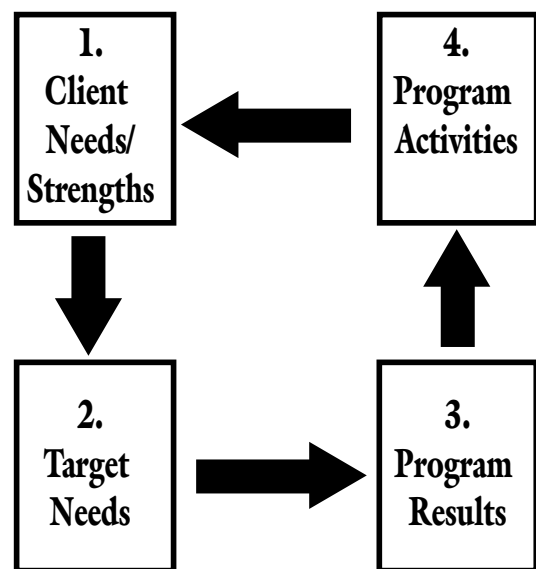
External evaluators also contribute unique value to assessment efforts.²¹ As individuals unaffiliated with the shared site intergenerational program, external evaluators can provide a more objective approach to the evaluation process. Additionally, by contracting with consultants, whether for repeated, ongoing or one-time only evaluations, program administrators can identify professionals with expertise that complements the talents of program staff and administrators. For example, evaluators may possess in-depth expertise on an aspect of shared site intergenerational programs that allows them to compare the target program to the range of comparable programs. External evaluators should provide a wide perspective on the information targeted by the evaluation, specialized evaluation expertise, resources not available to program stakeholders and, most importantly, objectivity.

What should be evaluated? Kuehne and Kaplan referred to an “IQ,” or intergenerational quotient, which might be a measure of the quantity and quality of intergenerational contact. The scope, duration and commitment of resources surrounding evaluation efforts run the gamut and can take several different forms.²² Evaluation may take place before a program begins and continue as an ongoing effort, or it may be conducted intermittently in concert with re-accreditation or significant program changes. The most important point for administrators and evaluators to consider is the goodness of fit between the goals of a program, the goals of the evaluation and the methods of evaluation utilized.²³ For example, while a comprehensive program evaluation should be matched to inclusive measures targeting each program objective, an assessment of a short-term intervention would likely find a good “fit” by targeting fewer outcomes reflecting the objective(s) of the intervention.

Regardless of the objectives of an evaluation, experienced evaluators advocate a systematic approach. Orthner and Bowen recommend using a results management approach (see Figure 7-2) in which program stakeholders identify the assets and needs of community members before identifying desired long-term and then short-term, programmatic outcomes.²⁴ Only after these steps are taken should stakeholders propose programming activities. Furthermore, only those activities that contribute directly to the long-term and/or short-term goals are implemented. Such an approach is utilized by many intergenerational program administrators, yet some

programs are attracted to a particular activity or type of programming without considering the fit between community and programmatic goals and the proposed intergenerational contact. For example, if the desired long-term goal of an intergenerational program is to increase the older adults’ sense of generativity, an appropriate activity might be enlisting the adults to participate in oral history interviews with middle school children. A less appropriate activity given this targeted outcome would be a series of performances made by children for the older adults in which the children and adults have limited opportunity for interactions with one another. Developers of the results management approach advocate use of evidence- and theory-based practices in developing and implementing activities intended to contribute to program and community outcomes.

Figure 7-2: Result Management Design²⁵



Practitioners and evaluators employing the results management approach utilize an ecological perspective. In this perspective, members of a shared site intergenerational community’s formal (e.g., program staff, consultants and professional contacts) and informal (e.g., clients, family caregivers and volunteers) networks, and the interface of these networks, are closely considered in developing programs and evaluations. Bronfenbrenner similarly argued for a contextual approach that incorporates the perspective of multiple stakeholders and the multiple environments in which

individuals live, work and play.²⁶ For example, while much of the earlier intergenerational evaluation research focused on the experiences of one age group of participants, current researchers strive to include the perspective of both age groups,²⁷ and even the perspectives of staff and family caregivers.²⁸ Such recommendations follow those of earlier intergenerational researchers, who proposed life-course and specialized cross-training for older adult and child program staff.²⁹ (For more information on cross-training, see *Chapter 4: Staff Development, Training and Retention.*)

Building on recommendations to take a broader, community perspective of intergenerational programs, Jarrott, Morris, Kemp and Stremmel determined that increased intergenerational training and programming at a shared site contributed to more positive attitudinal change among staff most actively involved in facilitation of intergenerational contact.³⁰ Additionally, researchers at the same program determined that intergenerational summer programming provided at a shared site, where contact between children and elders typically ceases during the children's 4-month summer break, yielded enhanced stakeholder support from family caregivers and program administrators.³¹ By assessing the perspectives of multiple stakeholders, evaluators can build support for intergenerational contact and consider other community outcomes of shared site programs.

SECTION 2: PRACTICAL CONSIDERATIONS, PROMISING PRACTICES AND TOOLS

Evaluation Considerations:

Goodness of fit between a program's objectives and evaluation efforts is paramount.³² When planning an evaluation, those involved must attend to several points. The purpose of the evaluation must be clearly identified and must reflect program objectives. Administrators must next consider the resources needed and available for the evaluation, including whether the evaluation will be conducted by external and/or internal evaluators, the time frame for the evaluation, the desired "products" of the evaluation (e.g., a detailed report, a press release statement, a complement of marketing materials), and the cost associated with evaluation choices. Evaluation-related expenses may include specialized training of program personnel, contracts with external evaluators

and consultants, and expenses tied to dissemination of findings and marketing materials.

When considering who will perform an evaluation, the desired expertise and knowledge required for the process should be identified. As previously stated, program staff may have expertise in gathering observational data that relies heavily on an in-depth knowledge of program clients. However, an external consultant may be best qualified to conduct focus group interviews or gather and analyze highly structured observational data because of the objectivity brought to the setting as well as specialized skills in these areas.

Time is another valuable resource to consider in planning evaluations. Some methods can be conducted quickly, while other methods are time intensive. Both can yield rich information for organization stakeholders if the match between evaluation objectives and measures exists. For example, a standardized pencil and paper survey using close-ended, "yes/no" questions may be implemented quickly, but will not likely tap the process behind successful intergenerational contact. For such a multi-faceted issue, more in-depth assessment methods are likely needed. Goodness of fit and realistic constraints should be the guiding factors.

To the extent possible, administrators, staff and evaluators should develop a holistic approach that taps a range of shared site intergenerational community members as contributors to the effort. Such evaluations need not cost a fortune, nor do they require years and throngs of professional evaluators to conduct. More importantly, throughout the evaluation process, evaluators should keep in mind the match between evaluation efforts and objectives. Poor fit, regardless of the skills of the evaluator, the power of the assessment tool, or the costs involved, may yield information that is meaningless or misleading. On the other hand, systematic evaluations informed by theory and research can justify funding, improve program quality and sustain programs.

Promising Evaluation Practices:

Just as program staff and administrators are often required to use different methods of documenting service delivery, evaluations often utilize multiple methods of gathering information. Evaluators may employ quantitative (i.e., items expressed or expressible



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as a quantity) or qualitative (i.e., items involving distinctions based on qualities) techniques. Additionally, evaluations of shared site intergenerational programs frequently include the perspectives of a range of program stakeholders.³³

Multiple methods:

Sometimes a single instrument will achieve the objective of an evaluation. For example, if program administrators want to know how many youth join intergenerational opportunities at a shared site community center, a simple count at these events would suffice. However, in efforts to improve, sustain and inform intergenerational programs, administrators would likely want additional information, such as why youth do or do not join the activities, what they do when they attend, and how they and the older adults respond to each other. Multiple methods of evaluation can provide broader and more in-depth information to enhance and better understand intergenerational programs. Use of multiple methods, such as observation and interviews, may be applied to a single or multiple groups of shared site community members. For example, an intergenerational literature program incorporated observations of participants and reflective journaling by the facilitator.³⁴ A more intensive example comes from an intergenerational school program led by Raynes and Rawlings who utilized observations of meetings, individual interviews,

group interviews, observations in the classroom and several surveys.³⁵ Multi-method evaluations can be brief or they may be time and labor intensive to conduct and interpret. The resultant findings can yield valuable evaluation data and can contribute to the development of standardized measures.³⁶

Multiple perspectives:

Ideally, perspectives of program staff and administrators, as well as family caregivers and other stakeholders from the community (e.g., agencies that interface with a shared site program), should be included in the evaluation process. These informants may report on one group's experiences (e.g., family and professional caregivers report on child and elderly relatives' experiences), or they may report on the program's meaning to themselves.³⁷ Capturing the perspective of the multiple stakeholders contributes to a holistic evaluation approach as evaluators gain perspective on the interconnectedness of program elements, clients and clients' families.³⁸

Gathering information from young children and/or adults with sensory or cognitive impairment presents unique challenges. Whereas considerable evaluation research is gathered through pencil and paper surveys distributed to and completed by individuals, young children and adults with dementia are often unable to complete such surveys. Young children are not good candidates for structured focus groups, though they may be able to engage in discussion with a skilled interviewer. Older adults with cognitive impairment may find it difficult to provide answers to open-ended questions, but may be able to provide categorical (e.g., "yes/no" responses) to close-ended questions.³⁹

Additionally, researchers employ observational scales extensively to evaluate the behavioral, social and affective nature of older adults with dementia and young children (e.g., Dementia Care Mapping; Bradford Dementia Group; Direct Observation Form; Achenbach). Although these scales focus on the behaviors of a single generation, they may be used to assess the experiences of one or both groups of participants in intergenerational contact. The use of observational evaluations is further addressed later in the chapter. Tips for gathering information from members of these groups can also be found online and in varied handbooks (See Appendix 7-1).⁴⁰

Multiple points of evaluation:

Circumstances at a program change, and the experiences/perspectives of individuals change (e.g., as an infant matures and goes through separation anxiety or as an adult progresses through a debilitating illness). Consequently, evaluations conducted at different time points reflect these changes and support efforts to keep a program up-to-date and responsive to current needs and strengths of clients. Repeated evaluations using the same measures on the same respondents can capture individual change as well as how relationships develop and change over time.⁴¹

Beginning a program with evaluation in mind affirms the importance of clearly defined objectives that inform activities, and in turn, direct evaluation efforts back to program objectives. Finding the fit between measures and program goals described by Kuehne and Collins can be a challenge because standardized measures specific to intergenerational programs are rare, yet they are the gold standard set by research funders.⁴² Measurements are often created by intergenerational evaluators for a specific study. They are also borrowed from other fields and adapted to intergenerational programs.

Multiple resources:

A range of resources exist to support evaluation efforts of shared site intergenerational programs. Resources can be found online in the form of tips for utilizing a particular evaluation method; sample instruments; printed resources and videos available for purchase related to funding opportunities; and contact information and qualifications of consultants.

Consultants can be identified at professional agencies and universities, where agency professionals, faculty and graduate students seek opportunities to apply skills and provide outreach to the community. The consultants need not necessarily possess expertise in intergenerational programs; rather, experts in program organization, goal development and assessment can effectively work with shared site personnel to design appropriate evaluations that fit the organization's objectives, budget, time constraints and expertise.

Web sites provide tips on skills utilized in program evaluation, evaluation manuals and toolkits; funding opportunities for intergenerational programs and evaluation efforts; newsletters about innovative

programs; and links for accessing evaluation and intergenerational professionals. Appendix 7-1 provides a sample of web sites relevant to shared site intergenerational program developers and evaluators.

Sample Tools

Because intergenerational research efforts are relatively new, evaluators of shared site programs frequently borrow their tools from other disciplines. Measures of customer satisfaction or staff morale may be taken from the business management field, and child development scales may be used as markers of the program's effect on young participants, while quality of life interviews may be used with elderly participants. Measures used with one group may not be appropriate for use with another group, though some adaptations have been made of child assessment tools to adult measures, and researchers at Virginia Tech's shared site program are exploring the use of adult observation scales to measure children's behavior.⁴³

Measures intended for children or adults may present challenges to evaluators attempting to use the instrument with all members of an age group. For example, quality of life surveys designed for older adults may be difficult or impossible for persons with cognitive impairment to complete. To accommodate functional or cognitive limitations, surveys may be administered in an interview format to include young children who cannot read or older adults with sensory impairment. Evaluators should pilot or practice using a measure before beginning the official evaluation.

As Kuehne described, many researchers of intergenerational programs create their own instruments because of the lack of appropriate measures. While such innovation contributes to the goodness of fit between program objective and measured outcome, it does little to increase the reliability or validity of findings in the field.⁴⁴ For example, a recent article published by Xavierius and Matthews described an observational scale created for their research to capture levels of engagement and expressiveness among frail elders; however, scales of engagement and affect developed and validated for this population have been widely used and disseminated.⁴⁵ Descriptions of the following measures used in intergenerational evaluation research are presented below: observations, interviews, surveys, administrative data and environmental assessments. Each may prove useful to shared site evaluators,

depending on the goal of the assessment. The constructs (concepts/outcomes) measured, ease of use, required resources (e.g., observers or videotaping equipment), and established utility in an intergenerational setting should be carefully considered as evaluators select their assessment tools.

Observations:

Observational assessments of shared site intergenerational programs provide evaluators with varied means to measure behaviors related to intergenerational programming. Observational assessments may be open-

and communication among clients and staff.⁴⁸ Hayes' evaluation of a shared site day program utilized both videotaped observations and observational notes recorded by staff. Appendix 7-2 provides additional notes on the methods and sample items of these and other intergenerational evaluation instruments.⁴⁹

When considering observational methods, it is worth discussing the use of videotape for evaluations. Some researchers advocate using video to capture observations.⁵⁰ Unique benefits are obtained by videotaping behaviors. Evaluators can watch the tape repeatedly to capture the

behaviors of target individuals. Additionally, use of videotape can enhance the reliability and validity of observers coding the tape. However, other researchers have reported on the challenges of videotaping, which center primarily on the distracting presence of the camera, particularly if it needs to be moved to capture data.⁵¹ For example, developers of the Dementia Care Mapping process emphasize the importance of being able to move around the room as an observer. An observer should be able to see all parts of the body, which can convey information that might be missed by a stationary camera. Additionally, the observer should be able to see what target individuals are looking at or with whom they are interacting, as well as how others are responding to them. A fixed

camera presents significant limitations in capturing this information, and a person continuously moving a camera around the room is intrusive in most settings. Finally, if videotape is to be used for marketing materials, administrators must obtain consent from each participant in the video, or in the case of young children and adults with cognitive impairment, assent must be obtained from the child or adult and consent must be provided by the family caregiver. Videotape has its advantages and drawbacks; it may be appropriate if it can be used unobtrusively and reliably capture necessary information.

Interviews:

When informants are unable to complete pencil and paper questionnaires, interviews can be a valuable way to obtain information. Interviews also provide the opportunity for evaluators to gather rich, in-depth information as interviewers can explain questions and probe responses with additional questions. Special training is needed to conduct interviews, whether the



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ended or highly structured. Newman and Ward's observational scale uses 10-second videotape segments of the behaviors of adults during intergenerational and non-intergenerational music activities to code for instances of smiling, singing, clapping, hugging, extending hands, tapping feet, verbal interaction, touching and holding hands.⁴⁶ Jarrott and Bruno utilized the Dementia Care Mapping technique to gather continuous observational data of behavior and affect of persons with dementia over 5-hour periods. Using this technique, each coder observed up to five people simultaneously, recording a code for behavior and a code for affect every five minutes for each person observed. Data were used to compare the behaviors and affect of adult day services clients during intergenerational and non-intergenerational activities.⁴⁷ In contrast, Salari gathered extensive ethnographic observations of intergenerational programs involving adult day programs. Trained research assistants recorded notes for 2-hour blocks of time on the environment, activities, reactions

respondents are young, old, cognitively intact or cognitively impaired. Organizations should consider having a person unaffiliated with the program conduct interviews to increase respondents' sense of confidentiality.

Interviews employ a variety of interactive and communication techniques to tap constructs related to intergenerational relationships and programs. For example, Rosenberg interviewed parents as proxy reporters of children's experiences at an intergenerational facility.⁵² Gigliotti and colleagues conducted open-ended interviews with intergenerational program staff and administrators regarding their experiences with and commitment to the shared site intergenerational program.⁵³ Salari, Jarrott and Bruno conducted interviews with adult day services participants with dementia about their experiences in intergenerational day care settings.⁵⁴ The Projective Assessment of Aging Method was developed as an interview technique used in clinical settings. Older adults are presented with ambiguous drawings depicting themes related to aging, and respondents are asked to discuss what the person in the story is feeling or doing. The interview highlights needs, concerns and feelings of the respondent that a clinician may then address with the client.⁵⁵

Interviews are frequently used to evaluate children's experiences in intergenerational settings. For example, several researchers described methods for capturing children's views on aging, which have been used to estimate the effects of an intergenerational program.⁵⁶ Jantz and colleagues developed the widely used survey instrument, *Children's Attitude toward the Elderly*, which incorporates a semantic differential of bi-polar adjective pairs, questions asked in response to a picture series, word association, and an assessment of cognitive development related to concepts of age.⁵⁷ Other researchers have asked children to respond to interview questions with drawings that were then interpreted as indicators of the children's views on aging and older adults.⁵⁸ An interview scale developed to measure children's acceptance of other children with disabilities provides an example of a scale that could be adapted to capture children's acceptance of older adults with physical and/or cognitive disabilities.⁵⁹

Surveys:

Surveys can be cost-effective means for respondents to provide confidential, even anonymous, feedback to

evaluators. Achieving adequate response rates can be challenging since paper surveys arriving in the mail or with a child's daycare paperwork are easy to ignore. As with interviews, surveys frequently tap respondents' attitudes towards another age group. The format may include ratings of the quality and quantity of contact with other age group members, or they may refer to the benefits and challenges of intergenerational programs.⁶⁰ Survey items frequently target generalized attitudes about members of another age group, such as Stremmel and colleagues' intergenerational exchange attitude scale, Tuckman and Lorge's early attitude towards old people scale, and different variations on the aging semantic differential. Typically, attitudinal scales focus on young people's views of older adults, but Seefeldt and colleagues developed a survey on older adults' knowledge of and feelings about young children.⁶¹ As a reflection of efforts to match measures to program objectives, Taylor and colleagues, who implemented a mentoring program designed to reduce the drug use risk of middle school students, used survey instruments that tapped the students' reactions to situations involving drug use, reactions to stress, along with other psychosocial measures and administrative data on school attendance.⁶²

Attitude research is prolific in the broad intergenerational field. It builds upon measures of knowledge about other age groups, which has been associated with attitudes about members of the other generation. As the field of intergenerational evaluation advances, Kuehne admonished that we must move beyond attitudinal research, for which Pettigrew identified limitations in interpreting as predictors of behaviors. Rather, evaluators must capture program and community outcomes that can be achieved through intergenerational programs.⁶³ Such efforts reflect goodness of fit in tying measures to program objectives.

Administrative data:

Every agency documents administrative data on an ongoing basis. Levels of enrollment, participation in activities, fees paid by clients, and tenure of enrollment are tracked for licensing, billing and reimbursement purposes. Administrators and staff at shared site intergenerational programs can add information to existing databases that enhances the understanding of program effects and effectiveness. For example, in addition to tracking how many people attended a particular activity, staff could rate the level of participant engagement in the activity, or activity evaluations may include space for

staff to recommend “follow up” activities that build on the presented intergenerational opportunity.

Tracking financial data is part of any program’s documentation and can be especially helpful to shared site intergenerational programs.⁶⁴ Some funding agencies, researchers, practitioners and policy makers question the utility in co-locating child/youth and older adult programs. Shared site programs possess the capacity to share resources as well as interpersonal exchange among clients. For example, the Betty J. Queen Intergenerational Center in Virginia shares a large, multi-purpose room which serves as a lunchroom shared by the senior and child programs. The ONEgeneration Daycare program, which houses an adult day care and a child care program, has one photocopier and one soda machine shared by both programs. Placement of singular pieces of equipment or shared spaces serves two purposes: (a) cost-effectiveness achieved by reducing the need for duplication of materials and supplies, and (b) opportunities for informal visits of staff from one program to the other. For more information on the effective design of shared intergenerational spaces is included in *Chapter 3: Facility Design and Building*.

Environmental assessment:

Recently, interest in the environmental space of intergenerational shared site programs has emerged, which reinforces the value for a holistic assessment of such programs. Kuehne and Kaplan called for evaluation of person-environment interactions, recognizing the potential for the physical and social environment to influence the level and quality of intergenerational interactions.⁶⁵ For example, when tall couches with firm cushions and narrower seats replaced low, deep sofas in Virginia Tech’s Child Development Lab School classrooms, the adults from the neighboring Adult Day Services felt more comfortable visiting the classroom and stayed in the classroom longer because they had comfortable seating that was easy to get in and out of.

Salari pointed out several challenges to creating an environment at shared site intergenerational programs that is age-appropriate for all clients.⁶⁶ Décor and furnishings, as well as programming, frequently infantilize older adult clients. Bulletin boards covered with construction paper decorations and coloring book pages, the presence of stuffed animals and children’s puzzles, and the presentation of “childish” games to children and adults as if they were cohort peers with

similar developmental abilities represent common instances of infantilization. Centers with more homelike atmospheres and in which adults and children engage in interactions that are generationally and developmentally appropriate support the dignity of older adults and foster child and adult development. Additionally, enlisting older adults, even those with cognitive impairment, as aids in a children’s activities give the adults age-appropriate opportunities for interacting with children.⁶⁷ Such physical and social elements should be assessed as they contribute to the environment of a shared site program and can affect the “IQ” (intergenerational quotient) of a program.

Each of the measures described above can have its place in a shared site program evaluation. However, a reliable, valid scale that measures something other than the targeted objectives or outcomes is not a good tool. Ultimately, the goodness of fit between program and evaluation goals and the measure(s) intended to assess achievement of these goals/outcomes must drive the evaluation effort.

STEP-BY-STEP CHECKLIST

Listed below is a summary of the five key steps in implementing an effective evaluation of an intergenerational shared site program:

Identify goals of the program:

Goodness of fit between program objectives, the purpose of the evaluation and the evaluation tools used will result in meaningful evaluation outcomes that inform program modification and can enhance sustainability. Evaluations should be timely and conducted repeatedly to reflect program development and changes, and to track data longitudinally.

Identify needed resources:

Funds are sometimes available from community organizations to support evaluation efforts. Additionally, foundations (e.g., the Quality Health Foundation), corporations (e.g., Verizon) and national organizations (e.g., the National Institutes of Health Small Business Grants) offer funding support for program development, enhancements and/or expansion. Evaluation is always a condition of receiving funds. Sample instruments, training on the development and use of evaluation tools, and recommendations for using evaluation data to enhance and sustain programs can be found online and through university programs,

organizations that support community development, and independent consultants.

Support participatory evaluation:

Each member of the shared site intergenerational community should be viewed as a resource, either to contribute to evaluation development or to respond to evaluation efforts. Although child/youth and older adults are the focus of the intergenerational contact, the experiences and perceptions of staff and family members are also important as they, too, are stakeholders in the shared site program.

Work with an external evaluator:

Organizations should seek outside consultation in conjunction with internal evaluation efforts as appropriate. The objectivity and specialized skills offered by external evaluators should contribute to achievement of evaluation objectives and should complement staff and administrators' skills.

Disseminate findings:

Evaluation findings should be disseminated to a wide audience of the public, practitioners, intergenerational networks, policymakers and researchers. Professionals should urge peer organizations or networks to compile evaluation materials and disseminate these.⁶⁸ Opportunities for dissemination abound through national, regional and state conferences (e.g., the Virginia Association for Early Childhood Education), organizational newsletters (e.g., Penn State's *Ideas for Intergenerational Living*, <http://intergenerational.cas.psu.edu/Newsletters.html>), intergenerational networks (e.g., the Wisconsin Intergenerational Network, www.wi-win.org), and professional organizations (e.g., state chapters of the National Adult Day Services Association).

CONCLUSION

As countries around the world face rising aging populations, the importance of positively influencing children's attitudes about aging and older adults increases. Likewise, as the need for effective, cost-efficient, human services programs increases and resources strain, shared site intergenerational programs are poised to meet the needs of community members. By using theory- and evidence-based practices to link children/youth and older adults in mutually beneficial exchange, shared site programs can successfully meet the varied needs of young and old alike. If such programs are to become



Photo by Carolyn Bryant

more common, more effective, sustainable and receive greater funding, they MUST be evaluated.

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Appendix 7-1 Evaluation Resources

RESOURCE	ORGANIZATION	LOCATION	DESCRIPTION
All About Intergenerational Interviews	Illinois Intergenerational Initiative	www.siu.edu/offices/iii/Publications/interv.html	Tips for intergenerational interviewing and communication.
Intergenerational Community Service Planner	Center for Intergenerational Learning: Temple University	www.temple.edu/CIL/TrainingICSP.html	Guiding questions to develop an intergenerational community service program.
Training for Intergenerational Programs	Center for Intergenerational Learning: Temple University	www.temple.edu/cil/TrainingMain.html	The Center offers workshops, consultations and training for Intergenerational programs.
Intergenerational State & Local Coalitions	Generations United	www.gu.org/memcoalition.htm	Provides a comprehensive list of Intergenerational coalitions.
Resources for Starting an Intergenerational Program	Intergenerational Innovations	www.intergenerate.org/resources.index.htm	Tips for starting an Intergenerational Program: offers tips for training, technical assistance, etc.
Evaluation/Research Intergenerational Materials	Generations Together	www.gt.pitt.edu/pub_entire.html	Provides list of publications on Intergenerational Evaluation/Research.
Expert Trainers Directory	Generations United	www.gu.org/nnet_dirbio.htm	Provides directory and contact information for Intergenerational trainers.
Intergenerational Programs & Aging: Research Corner	Penn State University	http://intergenerational.cas.psu.edu/Research.html	Program and logic models, as well as review of research findings.

Appendix 7-2 Sample Items of Measures Used in Intergenerational Evaluations

MEASURE (AUTHOR[S])	TYPE OF MEASURE	PROCEDURE/ MEASURE COMPONENTS	SAMPLE ITEM/ANALYSIS
Draw a person test (Falchikov, 1990)	Drawing analysis	Children draw 4 pencil/paper drawings: a young and old man and woman	Drawings are analyzed for predominant characteristics
Intergenerational Exchange Attitude Scale (Stremmel <i>et al.</i> , 1996).	Survey	Respondents indicate level of agreement with 34 items on a 7-point Likert scale (1=strongly disagree)	Children and older adults readily accept each other as equals.
Implicit Attitude Scale (Schwartz & Simmons, 2001)	Survey	Single questionnaire designed to measure contact frequency, contact quality, and attitudes toward the elderly. Frequency measured on a 7 point scale (0=almost never); quality of contact measured on a 5 point scale (1=very unfavorable)	Describe the nature of contact with older men and women.
Attitudinal Scale (Stremmel <i>et al.</i> , 1994)	Survey	Respondents (child care and adult day care administrators) complete surveys regarding their attitudes toward children, older adults and intergenerational exchanges	Thematic responses to open-ended items reveal benefits & challenges to intergenerational contact.
Anxiety About Aging (Lasher & Faulkender, 1993)	Survey: demographics and Facts on Aging	Respondents indicate level of agreement or disagreement with 20 items on a 5-point Likert scale.	I enjoy being around old people Scale (positive) I worry that people will ignore me when I am old (negative)
Children's Percep- tions of Aging and Elderly Inventory (Rich, Myrick, & Campbell, 1983)	Survey	Respondents express their agreement or disagreement with 20 items on a 5-point Likert-type scale.	Respondents are given a choice of smiling, neutral or frowning faces along a five-point scale. The items focus on three aspects of aging: social, physical and behavioral factors.
Children's Attitudes Toward the Elderly (the CATE) (Jantz <i>et al.</i> , 1977)	Interview: (a) word association; (b) semantic differ- ential; (c) picture series; (d) Piaget- based instrument	The semantic differential (SD) constructed for this study consists of 10 items on a 5 point, bipolar scale rating the two concepts of young people and old people.	- Word association sub-test: "What can you tell me about old people?" - SD sub-test: ratings of young and old people on bi-polar scales (e.g., sad/happy) - picture sub-test: ability to identify the oldest man
Children's Views on Aging (Newman, Faux, & Larimer, 1997)	Interview	Designed to be administered on a pre-test/ post-test schedule. It contains 4 sections with a variety of open-ended question; section 4 provides a semantic differential scale	How it feels to be old? Asks the child questions related to having an older adult in the classroom, what the child believes the older person might or could do with them in the classroom, and the child's perception of why older adults want to participate in the classroom.

MEASURE (AUTHOR[S])	TYPE OF MEASURE	PROCEDURE/ MEASURE COMPONENTS	SAMPLE ITEM/ANALYSIS
Contact Questionnaire, Miller and Dodder's revision of the Facts on Aging Quiz (FAQ), and the Aging Semantic Differential (ASD) (Knox, Gekoski, & Johnson, 1986)	Questionnaire	Contact Questionnaire: 7 point scale on aspects of contact with elderly people in general and the most familiar specific elderly ASD: attitude-assessment instrument that consists of a list of 32 bipolar adjective pairs in Likert scale format FAQ: 25 t/f items pertaining to basic facts and common misconceptions about aging	Contact questionnaire: overall quality of contact with elderly people in general and specific to an elderly person ASD: voluntary nature of relationship with specific elderly; similarity of self to known elderly FAQ: older people tend to take longer to learn something new
How older adults view children (Seefeldt, Bredekamp, Jantz, & Serock, 1982)	Questionnaire	A nationwide sample of about 1,000 persons, all over the age of 65, was asked to respond to questionnaire designed to assess attitudes toward children.	Three different types of questions asked of the older adults: (a) how they felt about children; (b) what they knew about them; and (c) activities they enjoyed with kids.
Loyola Generativity Scale and Satisfaction with Life Scale (Scott, Reifman, Mulsow, & Feng, 2003)	Questionnaires	Loyola Generativity Scale: 20-item closed-ended questionnaire; In an "agree-disagree" format where high scores indicate high generativity Satisfaction with Life Scale: five-item scale; high scores indicate high satisfaction	Loyola Generativity Scale: "I feel as though I have made a difference to many people" Satisfaction with Life Scale: "In most ways my life is close to my ideal" and "I am satisfied with my life"
Social Relationships Questionnaire (Raynes & Rawlings, 2004)	Questionnaire	Social Relationships Questionnaire was administered on a pre- and post-test schedule and was designed to measure older adult volunteers' sense of engagement in their local community	Open ended items asked about activities, perceptions of school staff support, and things learned during the intergenerational program.
Natural observation and videotaping (Ward, Los Kamp, & Newman, 1996)	Observation	21 residents participated in weekly music activities with young children and in similar activities without young children. Videotaping and a natural observer gathered data	Researchers analyzed videos and observations for positive behaviors and found two statistically significant differences between when children were there and when they were not present.
An observational study of Intergenerational activities and behavior change (Newman & Ward, 1993)	Observation	Client behaviors were recorded on videotape and coded.	Examples of observed behaviors: smiling, extending hands, clapping hands, tapping feet, singing, verbal interaction, touching, hugging and holding hands
An observational study of infantilization (Salari, 2002)	Ethnographic observations	Researchers observed perceived well-being of participants of two centers (qualitative); activities were observed to determine whether they were infantilizing or age-appropriate.	Reprimands, client use of toys, coloring with crayons, child-oriented stories, baby talk toward adults, labels such as "good boy/girl," and childish nicknames as infantilizing.
An observational study and the Older Adult Interview (Kuehne, 1992)	Observations and interviews	Observations were made of participants in dyadic and group settings. Participants were alternately observed for 15-second intervals Interview: questions were both open and closed-ended	Observation: Examples of coded behaviors include: Older adult assists, older adult instructs, child ignores, child offers object. Interview: Why did you join the intergenerational program?

MEASURE (AUTHOR[S])	TYPE OF MEASURE	PROCEDURE/ MEASURE COMPONENTS	SAMPLE ITEM/ANALYSIS
Gardening Program Interaction Analysis Instrument (Kerrigan & Stevenson, 1997)	Observation	The recorders observed a specific intergenerational pair for six 30-second periods, recording all behaviors observed	Coded observations include: elder provides instruction, student asks for help, elder engages in personal inquiry, etc.
Observational Study (Short-DeGraff & Diamond, 1996)	Observation	Through the use of an ABAB design and monetary time-sampling procedure, 10 elderly members of an adult day care center were observed for their social responses during two separate baseline and intervention conditions.	When subjects did interact, with whom were they interacting?
Modified Aging Semantic Differential (Pinquart, Winzel, Sörensen, 2000)	Pre/post test and a semantic differential scale (questionnaire)	The intervention involved an experimental and control condition; two-group repeated-measures design with three times of measurement was used to analyze attitude changes: there was a pre- and post-test measuring attitude A semantic differential measuring IG attitudes was administered; rate attitudes on 10 pairs of bipolar adjectives	Examples of Bipolar adjectives used: skillful—clumsy; dependent— independent; active—passive; mentally lazy—mentally alert; helpful—not helpful
Observational Study of an Intergenerational Shared Site Program (Hayes, 2003)	Observation	The evaluation utilized ethnographic field-based techniques to gather information—data collection strategies included videotaping, activity observational notes, and progress log journal	Activity Observational Notes focused on such themes as: “How was the intergenerational activity introduced or begun?” “Within the activity, who was involved?” “What are the participants doing at various points in the activity?”
Dementia Care Mapping (Bradford Dementia Group, 1997; Jarrott & Bruno, 2001)	Observation	The behavior and affect of persons with dementia were coded every 5-minutes during intergenerational and non-intergenerational programming.	Older adults’ engagement in conversation, expressiveness and sensory stimulation as well as levels of well-being are coded using highly structured guidelines.

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