

GUIDEBOOK FOR INTERGENERATIONAL PRACTICES

(FOR STUDENT LEADERSHIP PROGRAM USE)

代际共融實務手冊

(学生领袖計劃專用)

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Introduction

Welcome to intergenerational practices, a field of intergenerational studies and relationships that aims to bring people across generations together for mutual benefits. To date, intergenerational programs have been established worldwide with diverse pathways towards the aim (Kaplan, Sanchez, & Hoffman (2017). It can be for example met through intergenerational programs, activities, or games designed for learning and development purposes such as sharing life experiences, strengthening skills, preserving a lineage, carrying out a historical tradition, collaborating for a social issue, co-constructing artifacts, building a more inclusive society, etc. (Blackmore, 2010; Hatton-Yeo, 2015; Pinazo-Hernandis, 2011).

To describe intergenerational pathways as mechanisms, Zone of Proximal Development (ZPD) and Intergenerational Contact Zones (ICZs) can be referred to and found useful for creating intergenerational spaces for human development across ages (Kaplan, Thang, Sánchez, & Hoffman, 2020). In a nutshell, ZPD is coined by Vygotsky (1978) that humans develop when assisted by a more capable peer while ICZs (Kaplan, Sanchez, & Hoffman, 2017) refers to:

“... spatial focal points for different generations to meet, interact, build relationships (e.g., trust and friendships), and, if desired, work together to address issues of local concern. They can be found in all types of community settings including schools, parks, taverns, reading rooms, clubhouses, museums, community gardens, environmental education centers, and multi-service community centers” p. 17).

Both concepts emphasize social interactions. In comparison, the “zone” in ZPD is more towards a conceptual framework or, simply speaking, somewhere but in the mind(s) while the “zones” in ICZs are more towards a practical approach or, in other words, potential spaces in the environment for social interactions.

If an ICZ is more of what you are inspired to build for, say, promoting friendships across generations, there are two points that need to be clarified. First, the ICZ framework (Kaplan, Thang, Sánchez, Hoffman, 2020) stresses that the focus is in the environment, but it should not be limited to just a single dimension.

Rather, attention should always be much broadened to more such as “social, psychological, organizational, and cultural dimensions as well as physical properties,” “the “psycho-socio-techno-spatial environment,” “temporal, perceptual, political, institutional, virtual, ethical,” etc. (p. 3-5). Second, the ICZ framework embraces the concept of agency or capacity to choose. In the ICZ literature, the term “choice” is often seen as the essential component of practices for “pursuing [participants’] needs and interests for personal growth and development as well as social engagement” (p. 280). Since this guidebook aims for such particular aspects of practices, it is our hope that all the examples, lessons learned or tips offered in the guidebook are found consistent with the ICZ framework.

Based on the conceptual framework or the likes, intergenerational programs have been flourishing over decades in the U.S. (Kaplan, Sanchez, & Hoffman, 2017), evidently growing in Europe (Pinazo-Hernandis, 2011), and recently developing fast in China (Li, Kaplan, & Thang, 2020). In line with the East from the West trend, it requires the field to equip more and more people with relevant experience and expertise to plan, to program, and to operate, ensuring that more desirable program outcomes could be obtained more likely — this guidebook is therefore written in this context using Chinese and English languages.

Additionally, the global trend also reflects the fact that the purposes of promoting contacts of people across generations are many, and recently more new ones have emerged (Thang & Engel, 2020). It is important to raise intergenerational practitioners’ awareness of adding more excitement to their intergenerational programs by relating essential components to needs or social issues relevant to people across generations (Corsini & Wedding, 2010; Freedman, 1988; Kaplan, 2008) — such as:

- Exchange of civic values.
- Contributions to family or community.
- Active aging.
- Child development.
- Physical or mental health.
- At-risk behaviors.
- Agency or resiliency.
- Creativity.
- Cultural identity cultivation.
- Inter-group continuity.
- Combating ageism.
- Psychosocial needs.
- Social capital.
- Lineage.
- Nutrition.
- Music.
- Urban planning.
- New technologies.
- Environmental protection.
- Sustainability.

Despite purposes that vary, all of them spin around a “core.” In this publication, we would like to emphasize that the intergenerational approach is the central core that serves as a way to contribute to lifelong learning; active aging skills; and psychosocial needs of people across generations. More importantly, the core can also be considered “novel” if you want to take a fresh look at how an issue, a business, a project, a product, the environment, a system, an organization, a service or the likes could be transformed and taken to the next edge. That said, it needs more and more people to value the intergenerational approach or the core as a stimulating idea, and see how it is brought to fruition — this guidebook aims to facilitate this process.

As an adage of Chinese philosopher Lao-Tzu goes: “A journey of thousand miles must begin with the first step,” beginning with a proposal as the first step is highly recommended. Conceptually, beginning with a proposal as the first step is like building an incubator to nurture an intergenerational program concept or the core concept. But many people actually have found it difficult to do. In a recent experience, many undergraduate students in China are found interested in weaving their projects with an intergenerational approach (especially upon learning of potential outcomes), but when they come to the step of proposal — even a rough one using their mother-tongue language, they tend to find it difficult — if not impossible — to finish. Seeing this challenge, this guidebook begins as a quick reference devoted to drafting a proposal — it is however yet a guide aimed for a complete one, or one that is advanced enough (e.g., with a budget plan and market analysis) for funding purposes. That said, it is committed to driving you through faster to taking the first step of a thousand miles journey.

This guidebook can be treated as a quick starter:

1. In the first section, we offer a walkthrough including what you could do to start with a brand new idea for intergenerational programming and practice — all in a way as simple as possible.

2. In the second section, we lay out a real example of an intergenerational program and show you how it started from scratch, how it worked, how it was structured, and what difficulties we encountered but eventually obtained positive outcomes.



Section 1

Proposal, Planning, and Practice

Proposal

Determining the objective(s) is traditionally the first step. You may consider this proposal as a curriculum plan if it is applied in an educational area. You may also treat it as a business plan if business transactions are involved. For research or not, objectives are technically determined for program evaluation purposes. It is there the first step for the journey of developing an evidence-based program for dissemination purposes.

Towards a More Convincing Proposal

Demographic Conditions

If you are committed to writing a more convincing or complete proposal, consider taking some time to collect some statistics or demographic conditions that may support your project. It is a common practice that intergenerational programs tend to relate program objectives to some growing trends — especially demographic information of population aging or population of adults aged 55 or over in the region, in the country and/or around the world. If your project is mainly situated, say, in Chinese contexts, you might want to highlight some of the following points.

- The issue of aging in the population is becoming more serious.
- Population aging is currently in a rapid-growing trend.
- According to the China Development Report (中国发展报告) (2020)
(<https://www.cdrf.org.cn/laolinghua/index.htm>;
<https://cdrf-en.cdrf.org.cn/zgfbzg/index.jhtml>
(English); <https://tech.sina.com.cn/roll/2020-06-19/doc-iirczymk7921071.shtml>;

<http://caoss.org.cn/1article.asp?id=5250>), the population of people aged 55 or older will be over 200 million before the year of 2025, which is double of the population back in 2005; and by 2050, the population will be another double to more than 500 million.

- Based on the report and its preceding versions published in some prior years, China became a nation of population starting from the year of 2000 — especially when the population of older adults aged 55 or above kept increasing and that of younger generations aged 14 or below evidently decreasing in the next two decades.

- Compared with many other nations, China was seen late to become a “greying” nation; however, the rapidly increasing trend of population aging represents more and more major issues inevitably arising and affecting social progress — it then at least includes, for example, more families breaking up (e.g., more young people leaving home for work and then more older adults left uncared), more shortage of care or workers for home-based and community health care or special health requirements, more economic issues (e.g., more pressure of maintaining the lives of economically non-productive people by one person), the increasing lack of reliable systems to empower older adults to overcome hazards facing them, the more unmet goals of NGOs trying to transform aging issues into opportunities, etc (Hafez, 1994).

■ Psychosocial Needs

Besides demographic conditions, many intergenerational programs are created to advance the psychosocial need movement. Generativity is a term of developmental psychology originally coined by Erikson (1950, 1982). It refers to the developmental need of an older adult to care for and contribute one's legacy and life experiences to next generations — intergenerational programs are generally seen as effective mechanisms of sharing life experiences between adjacent or nonadjacent generations, thereby “fostering generativity” or helping older adults stay generative and avoid stagnation (in terms of Erik Erickson) or regret (Pratt, 2013, p. 97).

Upon learning more of the demographic and psychological conditions, you may feel more urged to establish an intergenerational project. To let more people feel as much as you, your proposal should also include them or the likes as much as possible, thereby making the case more convincing and acceptable.

But if you find this pre-proposal preparation yet more important, you can simply jump to the following steps first.





Steps of Writing an Intergenerational Proposal

Step 1: Objective(s)

Depending on particular needs, drafting a proposal generally requires you to start with at least an objective. In many intergenerational programs seen, more than one objective is common. For example, in an intergenerational program (IG-ESL) that aims to promote high schoolers' English as a second language learning skills in Hong Kong has a two-pronged objective (Lai & Kaplan, 2014, p.3), namely:

- “(1) To offer children opportunities to practice English as a second language while*
- (2) providing a new vehicle for retired citizens to stay active and connected to society.”*

If starting with the thinking of objectives is difficult, you might want to try with “audience” first. Here, “audience” refers to your potential participants, stakeholders, or people to be involved. Take IG-ESL as an example again, the audience includes:

- “(1) Older adults* (third-ages*, ages 55 or above);*
- (2) Children (ages 11-17);*
- (3) Facilitators (college students); and*
- (4) English language teachers.”*

Besides objectives, you might also need to consider the skills of the audience to require. For example, the IG-ESL program requires older adults to have a high self-perceived level of English language skills in speaking, reading, writing and listening. If particular skills are required, it is important to specify them clearly for recruitment purposes.

Step 2: Program Length and Frequency

In considering how long you want your program to last, consider your budget or all the necessary resources for implementation while predicting/expecting that it will end up with positive outcomes. Normally, for a program like IG-ESL that has been found effective with positive outcomes (Lai & Kaplan, 2016), it lasted for about:

- (1) 12 weeks or 3 months,*
- (2) participants came together on-site once a week for two hours.*

(*Note that in the field of intergenerational programs in the West, terms like “elderly” are usually avoided for combating ageism. This non-ageist trend in the East (e.g., Hong Kong) is emerging and highly recommended.)

Sometimes, older adults may need to be given a briefing session before having them engage other age groups. For example, in IG-ESL, older adults were required to pursue the weekly “professional development session,” which aims to “develop professional English language teaching skills.

Step 3: Program Formatting.

This step is one that can most likely distinguish your program from others involving people **truly** across generations or not. To ensure that your program is **intergenerational**, this step is a must and must be carefully planned. Albeit its significance, a brief description is sufficient for practice.

For a program to be intergenerational, scholars from the field of intergenerational studies tend to recommend participants to be as young as a grandchild, and people as old as a grandparent (i.e., 55 or above). Involvement of skipped and/or adjacent generations are also commonly seen in the field. There is an increasing trend of involving participants from as many generations as possible —e.g., intergenerational participants embedded in a multigenerational context. ([[[Reference: Intergenerational or Multigenerational? A Question of Nuance —Feliciano Villar]]])

The condition of mutual benefits is not a must when considering whether a program is intergenerational or not. However, in considering the impact of the program with an intergenerational configuration, it is generally considered a significant aspect for practices.

To plan more carefully, you might want to modify the formatting. Some examples are listed as below:

- Number of activities throughout the program
- Facilitator
- Medium of communication
- Support
- Guidance

Take IG-ESL as an example, facilitators are recruited “to provide support and guidance to ensure all participants understand all activities.”

Step 4: Recognition upon completion.

You may consider different ways to recognize participants’ contributions to your program. Here are some examples:

- Letter of Appreciation
- Certificate of Participation
- Transcript
- Professional certificate (recognized by your organization as an authority)
- Service-learning certificate
- Press conference
- Reunion

In IG-ESL, participants for instance are offered Continuing Education Credits issued by Penn State University. Although it involves a payment, all older adult members were pleased to obtain the transcript. In this experience, all the certificates and transcripts were presented to all participants during a press conference held at Hong Kong Baptist University, thereby strengthening the sense of recognition (see Photo 1).

Step 5: Activities

Traditional proposals (e.g., for funding purposes) generally require a brief description of your program at the beginning. This is indeed not easy to start with — it is like the first stroke of drawing that is often found hardest to begin with (Kaplan, 2006). If required, you may want to leave it to last — at least after most activities have been conceptually formed.

In each activity, let's begin with some needs to include for sure — they need to engage each other actively; they need to find each activity easy enough to understand; and they need to find it meaningful. Of course, each activity also needs to match program objectives. At any rate, activities that are simple are recommended for satisfying all the needs. "Simple" here means age-friendly enough, which equals games or activities that are not cognitively demanding. Games, for instance, that require participants to study and memorize lots of information first are not recommended.

Here is an example of a simple activity:

- With 10 dollars given, each intergenerational pair goes to a supermarket and purchases as many things as possible.

This activity can actually end up as a game if necessary:

- Winner goes to the pair with most items purchased from the supermarket.

For a proposal drafted for a minimal level (that is, for yourself or your partner), a brief description is enough. For a better draft, you may consider to include purpose, materials, activity procedure, bonus mission, etc. Take one of the IG-ESL activities as an example:

- Purpose: Understanding age differences with a positive insight to gain.
- Materials: Paper and pencils.
- Activity: Draw a fish. Discuss altogether why most fish drawn, regardless of age, tend to face a certain direction.



Photo 1: Participants' contributions can be recognized through a press conference.

Special Concerns for Your Proposal

If you want your activity style to be more “organic,” you may consider taking up a toolbox approach. For example, in this toolbox, you might want to include some cards that your participants can choose. “Choice” is considered to be a factor contributable to designing a more successful intergenerational program (Kaplan, Thang, Sánchez, & Hoffman, 2020). To learn more of how a toolbox approach can be designed more precisely, please refer to Lai & Burchett (2020) or contact the first author (alanlai@uic.edu.cn) — in this case, the toolbox approach was applied in a high school context in Hong Kong.

At times, you may have a superb idea that is projected more out of the box. It is especially the case when yours is not limited to the scope of activities. For example, an undergraduate student recently came up with a novel idea that aims to connect people of different generations through an online platform. In this way, the following list may be of help:

- A talent bank (paper-based though) that can help collect older adults’ talents.
- Statistics or trends that help you identify potential stakeholders or participants. It can also help to justify your program objectives — a more advanced level of proposal definitely requires this level of inclusion. In this case, she looked up the statistics provided by the United Nations and Fortune 500.
- Although it is an online platform, name at least three physical entities that can support and facilitate it.
- Find a partner or set up an action team.
- When describing the idea, use point forms.
- Instead of naming it “Activities” in Step 5 above, consider calling it “Actions” with the following recommended details:

- Purpose
- Supporting Entities
- Resources
- Procedure

隔代共融
導讀計劃

除父母外，祖父祖母的亲情和关怀便是孩子最强大、最可靠的支持。就让这份力量更有意义地发挥吧！

Intergenerational
Guided Reading
Program

Literature Resources

If you wish to further develop your proposal into a more complete one, you probably need to seek some literature support.

This following list includes some literature examples (that have been found useful to students). Some are more focused in the Chinese context while some that are more generic are highlighted — some links below are “open sources” using Google Scholar:

1. Intergenerational Contact in Chinese Families: Structural and Cultural Explanations (Gruijters, 2017) https://ora.ox.ac.uk/objects/uuid:b3d0e290-1937-46c8-85d4-703cfd1d4dd/download_file?safe_filename=Rob%2BGruijters%252C%2BIntergenerational%2Bcontact%2Bin%2BChinese%2Bfamilies%2B-%2BStructural%2Band%2Bcultural%2Bexplanations.pdf&file_format=application%2Fpdf&type_of_work=Journal+article.
2. A Cultural Perspective on Health Outcomes of Caregiving Grandparents (Guo, Pickard, & Huang, 2008).
3. Stereotyped Views of Older Adults in Children from the People's Republic of China and from the United States (Davidson, Luo, & Fulton, 2008).
4. A Qualitative Study of Filial Piety Among Community Dwelling, Chinese, Older Adults: Changing Meaning and Impact on Health and Well-Being (Dong, Chang, Wong, & Simon, 2012).
5. Longitudinal Evidence on Grandparenting and Cognitive Function in Older Adults in China (Pan, Zhang, & Shi, 2020).
6. The implementation and effectiveness of intergenerational learning during the COVID-19 pandemic: Evidence from China (Lyu, Xu, Cheng, & Li, 2020). <https://link.springer.com/article/10.1007/s11159-020-09877-4>
7. Intergenerational Programs and Practices in China: Results Based on a Web Search Method (Li, Kaplan, & Thang, 2020).
8. 老龄化背景下的代际策略及其社会实践——兼论中国的可能与未来（李俏，马修 卡普兰，2017）。 <http://www.cqvip.com/qk/81711x/201704/672743301.html>
9. Designing Brain Healthy Environments for Intergenerational Programs (Larkin, Kaplan, & Rushton, 2010). <http://pages.stern.nyu.edu/~kbrabazo/Eval-repository/Repository-Articles/brain%20healthy%20environments.pdf>
10. The Complement of Research and Theory in Practice: Contact Theory at Work in Nonfamilial Intergenerational Programs (Jarrott, & Smith, 2011)
11. Erikson's seventh stage: Fostering adults' generativity through intergenerational programs (Pratt, 2013).
12. Intergenerational Programs Review: Study Design and Characteristics of Intervention, Outcomes, and Effectiveness (Martins, Midão, Martínez Veiga, Dequech, Busse, Bertram, & Costa, 2019).
13. Exploring Technology Use in Reminiscence for Elderly Knowledge Recall (Haron, Sabri, & Jamil, 2014).
14. Intergenerational pathways to a sustainable society. Springer International Publishing (Kaplan, Sanchez, & Hoffman, 2017).
15. Intergenerational Contact Zones: Place-based Strategies for Promoting Social Inclusion and Belonging. Routledge (Kaplan, Thang, Sánchez, Hoffman, 2020).

Planning

Intergenerational programming is often neglected in the field of intergenerational practices, let alone the mention of “programming” in the proposal stage of linking generations (Thang, Kaplan, & Henkin, 2003). It is with the propensity that many Asian scholars or policies (e.g., those in China, India, Thailand, etc.) tend to limit the concept of intergenerational connection to the familial level. The urge to take a fresh look at the concept of programming is thus important — especially when we come to the stage of planning. In this guidebook, we may first of all need to ask whether your intergenerational program should involve not purely familial but also non-familial older adults.

After the question, here is another one: how may quality interactions be more likely ensured in an intergenerational program? Perhaps this question can then bring you to an essential part of intergenerational programming — careful planning. In intergenerational studies, careful planning has been repeatedly indicated to be a component most critical for avoiding conflicts between generations or simply making a difference (Henkin & Sweeney, 1989; Jarrott, & Smith, 2011; So & Shek, 2011).

But how to plan carefully? Let’s take a look at a recent study that systematically reviewed more than 3700 studies (Martins, Midão, Martínez Veiga, Dequech, Busse, Bertram, & Costa, 2019). Based on this review, notable intergenerational programs tend to share three common characteristics, namely:

- Involving generations that are skipped rather than adjacent.
- Aiming to bring different generations together for mutual benefits.
- Wanting to address issues also found relevant by participants.



Additionally, intergenerational neuroscience research also indicated ten elements to be essential (Larkin, Kaplan, & Rushton, 2010):

1. *Convenient access to facilities.*
2. *Stimulating commons that welcome people across generations.*
3. *Access permitted for protecting each age group’s own activities and integrity.*
4. *Activities separated yet ready to be shared.*
5. *At the same eye level.*
6. *Fun.*
7. *Choice.*
8. *Multi-sensory.*
9. *Avoid stereotypical cues.*
10. *Inventive play.*

All in all, since this guidebook attempts to serve as a quick starter, no more than three steps are expected to bring you through to designing, carefully and specifically, an intergenerational activity.

Step 1: Sit back and visualize.

In this step, you might want to just contemplate; visualizing how people of non-adjacent generations could really engage each other; equally share the fun; and feel benefitted together. Although it is a beginning step, you should have already gone through as many details as possible in your mind. Before coming to the next step, check if any of the ten essential elements (e.g., “choice”) can further modify your idea.



Step 2: Write, draw and naming.

Once a game or activity begins to take shape, write it down. You might just want to draw a schematic first. Next, give it a name that you believe can be stimulating and attractive.

Step 3: Test-run.

If you have an action team, try to run the game or activity and see if it really serves all purposes. If fun is considered to be most important of all, see if you can bring a sense of joy to your team first. Go back to Steps 1 and 2 until Step 3 is found satisfactory.

Take an intergenerational game recently designed and implemented as an example. It is called “Mystical Power.” In short, this is a game designed for a workshop that aims to encourage grandparents to read picture books to grandchildren. It was conducted at Dong Cheng Kindergarten in Pun Yu, China, in 2021. Parents from five families brought their parents and children to the workshop. It was a challenge

since it was the first time to design a game for kindergarteners, parents, and grandparents to play and learn together. To ensure that everyone could equally share the joy and feel benefitted, the game was programmed with the very principle of not cognitively demanding at all. It needed to be simple but fun enough.

The first step was proven again to be most difficult. The workshop was 1.5 hours long, and what could be done to ensure that all the five families could find the program at least not boring throughout the time? What could also be done to keep up kindergarteners’ inherently short-spanned attention?

For the sake of being simple, one game was determined to be enough. It was enough since it was divided into four rounds, between which grandparents read to their grandchildren picture books. Upon each round of reading, grandparents and parents stood in groups separately before the children. When the game began, each child was given a book and asked to bring their books either to their grandparents or parents. In this game, the winning group (i.e., either the parents or the grandparents) was the one with most children bringing their books to. In this game, everyone shared the joy equally — especially when they witnessed how the children’s choices or preferences changed when contacts between them and their grandparents increased over time through reading.

Practice

What might you want to anticipate before running your first intergenerational program?

In practice, we can anticipate that there are circumstances that each time you run a program, it requires you a great deal of flexibility. We should keep in mind that no matter how careful we are on programming, we have experienced many times of lessons learned from changes and circumstances that would frequently give rise unexpectedly. It is not practical if we rigidly accept no changes to occur and even judge them to be a sign of failure. It is actually the other way round that changes could be readily absorbed and seen as opportunities. It also requires everyone involved in the program to maintain composure. If you come across a supporting team member that would exhibit anxiety and stress, complain, cause distress to other program members, and expect every moment and need onsite to be perfectly foreseen, how could this situation be handled? In this case, we can simply choose to ignore while trying to keep the rest going as positive as possible. Direct confrontation should always be avoided.

Facilitating quality contacts on-site is a high-energy job. It requires teamwork and division of labor to support each other. It may all begin with an early arrival for setting up such as moving heavy couches around. Different programs are with different details. Some worth mentioning are listed as below:

- Greeting each arrival timely with a warm welcome.
- Testing technological systems (e.g., the onsite computer, projector, loud-speaker system, ventilation, etc.).
- Building a family-like environment.
- Setting up a refreshment area.
- Delivering materials.
- Following up stipend matters.
- Keeping up a journal on-site (e.g., for research purposes).
- Taking photos/videos and getting them shared.
- Taking attendance.
- Prioritizing your participants' comfort over your own.
- Filling up the space with background music, which may help set a positive mood for the whole time.
- Observing, adjusting and asking — “Are they really enjoying themselves?”

Some details can be easily ignored or undermined in practice. For example, we may assume that everyone can hear well, and the microphone system may not be made available on-site. When conducting a group game, there are some tips for the host:

- Use a microphone.
- Rehearse the game mentally.
- Keep in mind that the host is part of the fun.
- Treat your game as a way to generate endorphins in the brain, and feel responsible to make everyone happier and therefore — healthier.
- When hosting a game, make sure that the game is not simply played, but what can be learned.
- Prepare in advance thoroughly while staying flexible all the time — sometimes rules have to be modified for more fun and joy. But keep gameplay fair while modifying the rules.

Extra tips for practice:

- For anything that needs adjustment unexpectedly, observe the immediate environment first and see what is available around.
- It is not practical to please everyone and expect everyone to feel excited as much as others or you. In some cases, you are however encouraged to check up on those who seem not having as much fun as others. If it happens during a game, you might need to even stop the game and explain the rules.

Extra tips for keeping up a journal for research:

If program evaluation or research is part of the practice, you may need to keep up a journal throughout the program. In doing so, you are encouraged to consider the following tips:

- Record each session (by audio and/or video).
- Take field notes on-site, and write down the exact time along the notes.
- After each session, finish writing up a post-session journal within two to three days .
- Add photos to the post-session journals.

It is a challenge of managing your time when you need to take field notes along — you may feel overwhelmed easily. Without sacrificing the quality of the program, you might need to prioritize what is more important from moment to moment. It is always reasonable to prioritize the onsite needs of program members over your research since the latter can be taken care of later.



Section 2

IG Health Review as an Example

The need for this section lies in where you are up to — for example, you are interested in the intergenerational practice but unfamiliar to them. You might need to take a look at a real example, or you might just want to learn more. At any rate, we would like to bring you a real case in this section. To let you move on in a more meaningful manner, let's imagine you are part of the real case, and see how close or different you are from what we really did a few years ago.

Imagine you are responsible for delivering a course in the midst of the COVID pandemic. Students of this course are in their final year pursuing an undergraduate degree of psychology. Albeit the pandemic, students will attend the course in class but contacts between people inside and outside the campus are not

encouraged. This course is mainly about health psychology. It is structured with a number of objectives, one of which is to use knowledge of psychology to promote well-being and healthier lifestyles. You attempt to relate this objective to a course project using an intergenerational approach.

If you were the course instructor, what would you want to do? Would you opt to believe that using an intergenerational approach could benefit students in terms of the objective? If so, below are some questions that may arise to you:



- 1. How is the program related to knowledge of psychology?*
- 2. How can the program be structured in ways to promote wellbeing and healthier lifestyles concurrently?*
- 3. If the course project is based on an intergenerational approach, how can older adults from the community get involved in the course?*
- 4. How can older adults be recruited, and how many older adults are needed?*
- 5. In light of COVID-19, how can students reach out, contact, and interact with older adults?*

These questions were indeed in our minds when we began. We found them difficult and actually thought of giving up due to the pandemic situation that simply discouraged people from contacting each other.

Before giving up, we came down to doing a proposal and later learned that the more we spent time on it, the more we realized that the attempt was viable.

Below is the actual proposal, which is simple but practical enough to keep us busy to push through.

Proposal

Proposed Program Title: Intergenerational Health Review (IHR)

Objectives

1. To create contact opportunities between college students and elders.
2. To increase students' knowledge about ways to gain control over health issues and treasure healthier lifestyles.
3. To enhance elders' sense of contributions to youth.
4. To promote the concept of "positive intentionality," which refers to a sense of well-being for managing health-composing behaviors, coping stress, or facing illnesses.

Overview

This Intergenerational Health Review (IHR) is designed as a course group project and, in the meantime, an intervention model within which students document stories of reminiscence based on an event of recovery from illness in an elder's life. The project components are based on (1) college students' educational needs of reaching out to older adults for learning and personal development purposes, and (2) older adults' psychosocial needs of accepting one's life as meaningful and avoiding regret. Currently in the college, opportunities for students to learn with real-world contexts and develop through older adults' real-life experiences outside the classroom are scarce. Furthermore, older adults' needs of finding meaning in life; feeling positive by sharing personal experiences; and gaining a sense of psychological well-being are ever-increasing due to the rapid increase of the greying population in China.

Implementation Plan

1. Four students — as a group — identify one elder aged 55 or above ($n=1$), who has a prior experience of a major health issue (seriously ill — mental or physical — or injured) that has been fully recovered.
2. Interview the elder online for reviewing their successful illness-coping experiences.
3. The focus of the review is limited to the notion of "positive intentionality," — i.e., any way of living, belief, style, attitude, and corresponding actions the elder chose to stay with and found useful to coping with the illness through to recovery.
4. Students will receive training focused on interviewing skills. Example questions used in the training include:

(1) What were the health issues and what was the major impact to your life during the time?

(2) Besides having adhered to traditional medical procedures, how did you cope with the anxiety, stress and/or obstacles?

(3) What was the biggest challenge, and how did you stay positive or less negative throughout the time?

(4) What advice would you give if somebody like him/her is having the same health problems?

5. All interviews will be recorded.
6. After the interviews, students are required to write up a case report.
7. All cases will be compiled as a (health review) booklet. All participants will be invited to take part in this task.
8. The booklet will include five parts:
 - (1) *introducing the interviewee and his/her health issues;*
 - (2) *major impact and challenges to him/her;*
 - (3) *ways to cope with stress, anxiety and other problems;*
 - (4) *best advice to others having similar issues; and*
 - (5) *summary of lessons learned.*
9. The booklets will be printed and distributed to hospital outlets.

Recruitment:

Interviewees will be recruited by students based on their personal networks. Students are welcome to approach their grandparents or relatives aged 55 or above first.

(End of Proposal)

In this proposal, you may notice that it looks different from the proposal structure laid out in the previous section. For example, this proposal has a brief overview written to describe the program model and rationale behind. It is due to the fact that IHR must be even more carefully weaved with the already existing curriculum of a course. In other words, it requires a very precise and concrete idea right from the beginning. However, since IG-ESL was more on the activity-based level (i.e., there were 12 activities for the 12 intergenerational sections in 12 weeks), more focus was given to the project formatting and activities. In practice, an initial or simple proposal can be instrumental, meaning that it can help you plan for a program and keep everything forward. It is unlike a proposal that needs to be fully complete for some application purposes. The latter of course is equally important than doing a proposal for the instrumental purpose just mentioned.

With the example proposal of IHR given, the rest of the section is devoted to the aspects of program implementation, evaluation and possible project outcomes. In doing so, IHR mainly remains to be the example all along. However, lessons learned from IG-ESL are also presented.

Program Implementation: Lessons Learned

When implementing the IHR program, it was both easy and difficult. On the relatively easier front, elders were recruited by students. Probably due to it as a course project, students generally felt obliged to push through and recruit suitable participants. It is in contrast different from the experience of the IG-ESL Program in which recruitment was not so “running on its own.” In IG-ESL, older adults were recruited through a recruitment seminar supported by the Institute of Active Aging (IAA) at Hong Kong Polytechnic University. Ms. Teresa Tsing, the then director of IAA, provided all the necessary support such as the access to the institute’s LISTSERV to all her members.

To learn more on the front of recruiting senior adult volunteers, Professor Matt Kaplan’s “Jump on the Bandwagon” Effect (Kaplan,1993) is worth studying. In this recruitment model, seniors are actually encouraged to “sample what it is like to interact with, and learn about, youth before deciding whether to join an intergenerational program” (p. 71). In other words, it is like jumping on the bandwagon more likely when you see someone you know enjoying there. More specifically, the “trick” to let seniors feel more interested in joining by adding an “interim step” (p. 75) to conceptually somewhere between seniors’ responses of “yes” and/or “no” to the program. The seminar conducted at IAA was an example of the interim step since the seniors were given an opportunity to make a decision somewhere between their “yes” and “no” to IG-ESL; to become familiarized with the program; to imagine what benefits they could enjoy after joining; to be convinced that they could be there to contribute to youths; and that they were very much wanted. In that experience, all of the attendees signed up.



To date, intergenerational program developers world-wide have attempted to promote intergenerational contacts in the virtual environment (Kaplan, Sanchez, Shelton, Bradley, 2013; Generations United, 2021). In implementing IHR, intergenerational contacts were mainly facilitated online, which was considered quite a challenge since senior volunteers were expected to use technologies such as Zoom for engaging the

students. In the beginning, no one was sure if the technical requirement could be fulfilled. In this regard, students had to be convinced that this challenge could be addressed using the dual strategies below:

- Consultation support: Consultation support was available both on-site and online during the time of intergenerational contacts. It included the course instructor (online) and assistant (on campus) to provide immediate assistance.
- Home-based assistance: Students who were then living with an elder were chosen to be the chief recruiters of senior volunteers — in this way elders living with students could be recruited and assisted throughout the program at home more likely.

We learned that the strategies were helpful. However, consultant support was actually sought only twice, and senior volunteers living with students were about 20%. To our surprise, the anticipated concern of technological issues against elders was proven not necessary since we learned that they turned to technologies they were already familiar with (e.g., WeChat) (Lai & Xing, 2021).



■ Evaluation and Possible Program Outcomes

For a program to become evidence-based, it needs to be evaluated, better peer-reviewed and then published. Both IG-ESL and IHR have gone through this process.

Depending on project objectives, program evaluations vary in the methodologies. In this guidebook, we just recommend some basic ones based on IHR, so that you have a quick sense of what program evaluation is like. To learn more, you are highly encouraged to refer to some intergenerational evaluation resources (e.g., Jarrott, 2019).

Evaluation Outcomes and Beyond

In IHR, we simply focused on benefits perceived individually by program participants. Lead-in questions were used, aiming largely to understand how they felt about the program in general and how they felt benefitted in certain ways. Since there were two different age groups in the program, we designed two versions of post-program questionnaires. For the older members, the questions were more about measuring feelings about sense of wellbeing and psychosocial needs while the focus was shifted more towards the impact on younger participants' academic learning. To help quantify the feelings (or perceived impact), self-rating scales using -2 (strongly disagree), -1 (disagree), 0 (not sure), 1 (agree), and 2 (strongly agree) were employed. To understand their feelings further, we also added a few open-ended questions to the survey asking them to provide some examples upon completing some of the rating responses. As compared to many other programs, what we employed was a simple one. Albeit its simplicity and lack of complicated statistical analysis, it has been found a recognized way of working for program evaluation



Photo 2: Post-program booklets were distributed at The First Affiliated Hospital, Sun Yat-Sen University (中山大学附属第一医院).



Photo 3: The booklet was treated as a health education reference (健康教育资料) in a hospital in China.

purposes, and it fortunately led to an award of Generations United for evaluation research received in 2015.

Beyond research, we also learned of another fruitful outcome yet mentioned. The booklet (Lai & Xing, 2020) titled "Health Review: 18 Successful Cases" was reviewed by two medical practitioners, published in the college, and eventually distributed in hospital outlets in China as a health education reference for medical staff, patients and families (see photos below). It documents 18 seniors' health histories collected through an intergenerational interview approach.

To the developers of IHR, this is a unique and rewarding outcome experience although it is based on a non-evaluation type of results.

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This guidebook can be treated as a quick starter:

1. In the first section, we offer a walkthrough including what you could do to start with a brand new idea for intergenerational programming and practice — *all in a way as simple as possible*.
2. In the second section, we lay out a real example of an intergenerational program and show you how it started from scratch, how it worked, how it was structured, and what difficulties we encountered but eventually obtained positive outcomes.

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Intergenerational practices -- a field of intergenerational studies and relationships that aims to bring people across generations together for mutual benefits.

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