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Unlocking the Potential of Older Adult Volunteers: The Intergenerational Leadership Institute Model as a Resource for Bolstering Extension

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Unlocking the Potential of Older Adult Volunteers: The Intergenerational Leadership Institute Model as a Resource for Bolstering Extension

Abstract

The Intergenerational Leadership Institute (ILI) is a yearlong certificate training program developed by Pennsylvania State University for older adults (55-plus) seeking new lifelong learning and civic engagement experiences and opportunities to contribute to innovation and change in their communities. Data from participant surveys and observations of ILI-related training and program planning sessions indicate growth in participants' intergenerational programming and leadership skills in the context of translating intervention ideas into concrete plans and programs. This article describes the process and outcomes of ILI chapters in State College, Pennsylvania, and Montgomery County, Maryland, and tools and resources for assisting with program dissemination.

Keywords: [intergenerational programs](#), [older adult volunteers](#), [leadership development](#), [self-directed volunteer teams](#)

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Introduction

America is graying. The 65 and over population is expected to grow from 49 million (15% of the overall population) in 2016 to nearly 95 million (25% of the population) by 2060 (Vespa, Armstrong, & Medina, 2018). There are divergent viewpoints about prospects for aging societies, from a focus on fiscal strains placed on health care and social security systems (World Health Organization, 2012) to an emphasis on positive contributions older adults make to their families, communities, and broader society.

One challenge associated with the latter perspective is that there is a shortfall of meaningful and accessible opportunities for older adults to make such contributions.

According to a 2014 report from the Community Experience Partnership,

Few communities have the systems or structures needed to effectively leverage experienced adults. Studies repeatedly show that older people either don't know where they can put their talents to good use, or they are viewed as liabilities with out-of-date skill sets and a fear of change. As a society, we've been so focused on the costs of an aging population—projected Medicare and Social Security shortfalls, a looming shortage of skilled nurses, and so on—that we are ignoring the upside. (pp. 9–10)

Intergenerational programs help unlock the potential of older adult volunteers to contribute to the social good. Older adults and other generations are connected in "purposeful, mutually beneficial activities which promote greater understanding and respect between generations and contribute to building more cohesive communities" (Beth Johnson Foundation, 2011, p. 4).

Whereas the intergenerational studies literature attests to wide-ranging benefits for program participants and their communities (Brabazon & Disch, 1997; Kaplan, Sanchez, & Hoffman, 2017; Kuehne, 1999; Newman, Ward, Smith, & Wilson, 1997), there are also obstacles to developing and sustaining intergenerational programs (Henkin & Butts, 2002). We know, for example, that successful intergenerational programs are staff intensive; staff members' time is needed for handling responsibilities associated with program planning, activity facilitation, and program evaluation. In the current climate of limited financial resources, the idea of simply hiring staff with the time and appropriate skills for taking on such diverse responsibilities is not always feasible.

This article introduces a new approach for generating intergenerational programming leadership. The Intergenerational Leadership Institute (ILI) is a yearlong certificate training program developed by Pennsylvania State University for older adults (55-plus) seeking new lifelong learning experiences, intergenerational programming skills, and opportunities to contribute to innovation and change in their communities. The ILI also functions as an incubator for new intergenerational programs that address priority needs at the local level. Older adult volunteers, trained to be leaders, are at the center of the ILI model.

The ILI model embraces three sets of objectives—lifelong learning, meaningful civic engagement, and new intergenerational program development (or enhancement). Several examples of larger scale programs with parallel objectives include Experience Corps (<https://www.aarp.org/experience-corps/>) (now under the aegis of AARP), Generation to Generation (<https://generationtogeneration.org/about-us/>) (with Encore.org leading a coalition of over 40 partnering organizations), Legacy Leadership Institutes (University of Maryland's leadership skills training program for older adults) (Wilson, Steele, Simson, & Harlow, 2006), WisdomWorks (National Council on Aging's model for generating self-directed volunteer teams) (National Council on Aging, 2007), and Generations United's Senior Fellows program.

The ILI model takes a self-directed volunteer leadership development approach consistent with the leadership training orientation of the Legacy Leadership Institutes and Wisdom Works models. ILI participants have latitude in determining the nature and depth of their involvement in local intergenerational practice.

The ILI model seems to be a good fit for Extension, which has a 20-plus-year history of developing and implementing intergenerational programs in various contexts, particularly in the children, youth, family, and adult development program areas (Kaplan & Brintnall-Peterson, 2001/2002; Kolodinsky, Cranwell, & Rowe,

2002; Krasny & Doyle, 2002; Sowle, Francis, Margrett, & Franke, 2016). Extension-based or Extension-supported ILI chapters could function as systems for the strategic infusion of older adult volunteers in support of these and other intergenerational initiatives that have taken root in Extension. The ILI model also represents a strategy for building the capacity of current Extension volunteers to initiate new intergenerational projects within select program areas.

In the remainder of this article, we provide detail on the ILI program model—its components, target audience, and objectives; describe methods used for program evaluation and outcomes identified through such evaluation; and discuss challenges to and resources for implementing the ILI model and implications for Extension. In doing so, we draw on examples and lessons learned from ILI chapters established in two sites: State College, Pennsylvania, and Montgomery County, Maryland.

The State College chapter was established by the Penn State Intergenerational Program (a research and resource center rooted in Penn State Extension) in 2014 in partnership with the Penn State Center for Healthy Aging, Retired and Senior Volunteer Program (RSVP) of Centre County (Pennsylvania), and Osher Lifelong Learning Institute (OLLI) at Penn State, University Park. A second ILI chapter was launched in Montgomery County in 2015 by the Heyman Interages Center (based at the Jewish Council for the Aging of Greater Washington). All authors on our team were involved in developing ILI resource materials and conducting ILI short course sessions in at least one site.

The ILI Program Model

ILI Program Components

The ILI model provides a distinct strategy for recruiting, motivating, and activating older adult volunteers in intergenerational practice. This strategy involves

- establishing a formal ILI chapter in partnership with local organizations that engage older adult volunteers and conduct community improvement projects,
- presenting a short course (16 contact hr) designed to provide ILI participants with a foundational background in intergenerational programming,
- conducting monthly application sessions designed to help ILI participants refine and implement their intergenerational program ideas, and
- providing participants with additional training and networking opportunities, such as intergenerational study tours, site visits, and conference presentations.

Program components are described in detail in Table 1.

Table 1.

ILI Program Model at a Glance

Program component

Description

Feature
Short course on
intergenerational
programs and practices

Eight modules (delivered via eight 2-hr sessions or two full-day sessions):

1. Introduction to the ILI Short Course and Intergenerational Programming
2. IG Programs and Practices: Background and Rationale
3. Bolstering Program Impact Through Moving Up the "Depth of IG Engagement Continuum"
4. Principles of IG Program Development
5. IG Approaches for Community Building: Part I^a
6. IG Approaches for Community Building: Part II^a
7. IG Program Leadership and Evaluation^a
8. Summarizing Key Points of the ILI Short Course on IG Programs and Practices^a

Application sessions

Monthly meetings in which ILI members address their intergenerational program ideas:

- ILI members provide updates and feedback on ILI-inspired projects.
- ILI members leverage collective expertise (including that of ILI partners) to determine and take next steps in intergenerational practice and leadership.

Additional training and
networking opportunities

Meetings and events that contribute to extended intergenerational programming and leadership skills development, such as

- intergenerational site visits (organized by ILI chapter coordinators);
- intergenerational conferences and meetings (e.g., Generations United's biannual conference, state intergenerational network meetings, training workshops conducted by local organizations and nonprofits); and
- participation in local meetings and events with an intergenerational component.

Note. ILI = Intergenerational Leadership Institute. IG = intergenerational.

^aStarting with Module 5, ILI participants (either individually or in small groups) share their ILI plans, ideas, and/or projects.

After ILI participants complete all three program components, they become "ILI fellows" and, presumably, will continue with their intergenerational journeys, in line with their interests and skills and opportunities for

participation and leadership.

Who Should Join the ILI Program?

At each site, and for each cohort of ILI participants, the goal is to recruit eight to 15 community-minded and civically engaged older adults. ILI participants are recruited through senior centers, retirement communities, veterans service organizations (e.g., Veterans of Foreign Wars), service clubs (e.g., Rotary, Lions, Kiwanis), and other organizations that provide older adults with lifelong learning and volunteer opportunities (e.g., RSVP and AARP chapters).

Program Objectives

The primary objectives of the ILI program are for participants to gain practical intergenerational programming skills, experience personal growth, and display increased efficacy as community change agents.

More specifically, participants gain competency in the following areas:

- ability to identify issues of concern to multiple generations;
- familiarity with the interdisciplinary field of intergenerational programming, including its origins and dozens of program models that contribute to healthy human development, stronger families, and more cohesive, caring communities;
- ability to tailor intergenerational programs and practices to address local needs and build on local assets; and
- ability to work proactively and collaboratively with individuals and organizations that have a shared commitment to promoting intergenerational programs and practices.

In terms of community impact, the informal expectation is for each ILI chapter to generate at least two or three ILI-inspired projects per cohort of participants. In developing projects, ILI participants are expected to use effective practices as described in the intergenerational studies literature (and covered in the ILI short course), such as collaborating with local organizations, planning programs that meet real needs, and planning activities that demonstrate developmental and cultural appropriateness.

Program Evaluation Methods

To assess program impact on participants, the project coordinators (the first and third authors on our team) conducted surveys with two groups of ILI program participants (all 55-plus years of age): 11 from the State College chapter (nine were 65-plus) and 14 from the Montgomery County chapter (11 were 65-plus).

At both sites, surveys were conducted before and after the short course. For the State College chapter, survey results are reported for the cohort attending eight weekly sessions beginning April 2016, and for the Montgomery County chapter, results are reported for the cohort attending an intensive 2-day weekend workshop offered in March 2015. Of the 25 ILI participants who filled out pre- and postcourse questionnaires, 80% had attended at least six of the eight modules of the short course.

The survey instrument included items designed to ascertain program impact on participants' levels of motivation to engage in future intergenerational work and on their self-reported intergenerational program planning and implementation skills.

For several questions, response options were 5 points on an "intergenerational trajectory" scale intended to reflect a continuum of levels of intergenerational engagement. Higher numbers on the scale alluded to progressively deeper levels of participation. The values for the 5 points of the scale are as follows:

- 1 = *hearing about an intergenerational program/program area,*
- 2 = *learning about a particular intergenerational program or set of programs,*
- 3 = *joining an intergenerational program,*
- 4 = *immersing oneself in an intergenerational program, and*
- 5 = *taking a leadership role in an intergenerational program.*

The project coordinators, with the assistance of a visiting Extension associate (the second author on our team), took detailed notes of all short course sessions, application sessions, and additional training and networking meetings and events. The project coordinators later conducted content analysis of the transcripts of these sessions to gain a more nuanced understanding of how participants' knowledge, perspectives, and future plans for intergenerational programming evolved following the short course. Particular attention was paid to how ILI participants integrated what they learned from the short course into their intergenerational programming plans and endeavors.

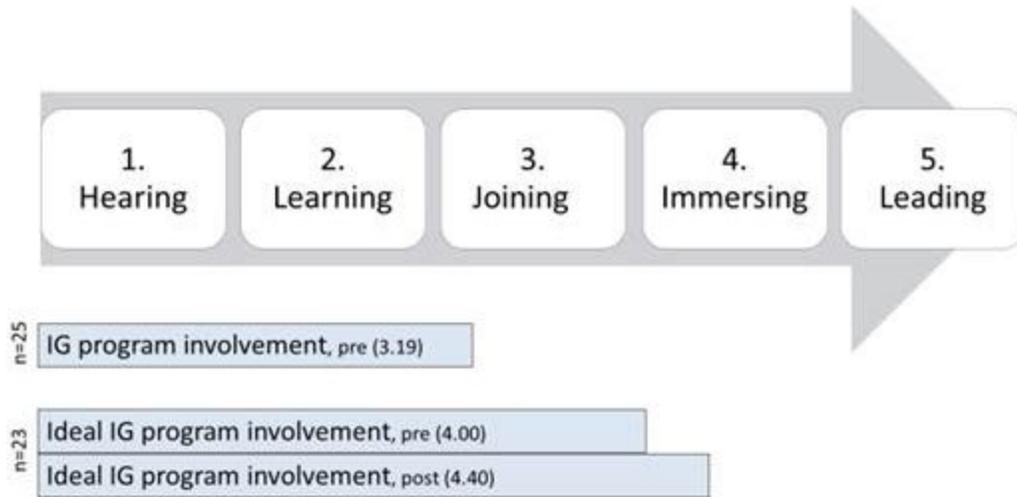
Outcomes

Impact on Participants' Intergenerational Program Involvement and Planning and Implementation Skills

As indicated in Figure 1, using the previously described 5-point intergenerational trajectory scale, we determined that the average level of respondents' preprogram involvement with intergenerational programs was the "joining" (or basic participation) level. We interpret this as indicating that respondents, upon signing up for the program, were already fairly engaged and interested in the subject matter. With regard to how participants characterized their ideal level of involvement with intergenerational programs, the average response was the "immersing" level, indicating that they had an interest in a deeper level of engagement than that achieved by just signing up for or occasionally showing up at a program. By the end of the 8-week short course, the depth of participants' stated ideal level of involvement had increased to a level between "immersing" and "leading." These results suggest that the short course had a moderate impact on participants' interest in and motivation for becoming more heavily immersed in intergenerational programs.

Figure 1.

Changes in ILI Participants' IG Trajectories: Pre- Versus Post-Short Course Comments about Previous and Ideal Levels of Program Involvement

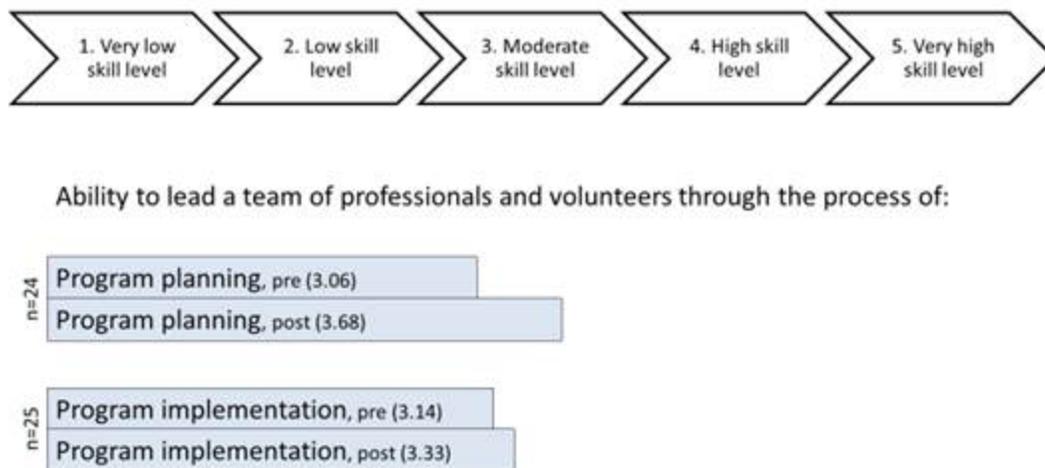


Note: ILI = Intergenerational Leadership Institute. IG = intergenerational.

Participants experienced a higher level of program impact (from the short course) on their program planning skills as compared to a more limited level of improvement in their program implementation skills (see Figure 2).

Figure 2.

Changes in ILI Participants' Self-Assessment of Skills: Pre- Versus Post-Short Course Self-Assessed IG Program Planning and Implementation Skills



Note: ILI = Intergenerational Leadership Institute.

As several respondents noted, the short course served as a beginning or intermediate level of training, short of the skill level they deemed necessary to be able to assume a "leadership" role in establishing a new intergenerational program. Along these lines, one ILI participant in the State College chapter said this:

"I am not sure I am ready to take a leadership role. The groups that were formed [during the last 2 weeks of the short course] were interesting but I do not have the backgrounds that the leaders have, and I often have difficulty making cold calls to community members, etc. . . . I do not feel I am as

It was during the next phase, the monthly application sessions, that the ILI participants exhibited a surge of demonstrable growth in their intergenerational programming skills, including in making strategic contacts with local community organizations, accessing needed information and materials, designing and facilitating program activities, and presenting their work to other professionals and to the public.

A fortuitous occasion that provided additional context and support for ILI participant leadership to emerge was an invitation for four participants (of the State College chapter) to present their ILI-related work at the 2017 Generations United conference in Milwaukee, Wisconsin. The session was well attended (42 participants), and feedback was positive; several attendees expressed interest in specific projects and inquired about possibilities for establishing ILI chapters in their localities.

Peer Support Dimension of the ILI Experience

A recurrent theme in ILI participants' comments about the program was how much they appreciated the support and feedback they provided for one another. This concept is reflected in the following quotes from members of the State College chapter:

"[At the] monthly sessions we got to see what the three class groups were working on and how they were developing their ideas. It was fascinating to hear about each person's project and their passion for the project too. I enjoyed each session, and I learned something from each person as they traveled the intergenerational journey." —Retired principal

"We had a 14-hr bus trip . . . and I smile when I think about it, but I learned more about the people who were involved in the cohort. It was interesting. . . . We were able to talk about our projects in a different way . . . and to help each other, and to talk about what we had learned, and what we want to do, and what our dreams are for ILI." —Retired university administrator (upon returning from the Generations United conference)

ILI Chapters as Incubators for Intergenerational Programs That Improve Community Quality of Life

Table 2 describes some of the ILI-inspired projects from the State College and Montgomery County ILI chapters. These projects were designed to address local needs while drawing on ILI participants' skills, contacts, and interests.

Table 2.

ILI-Inspired Projects Conducted by Chapters in State College, Pennsylvania, and Montgomery County, Maryland

ILI chapter	ILI-inspired projects and their community outreach outcomes
State College	SAVOR (Sharing And Valuing Our Relationships): Monthly meals, conversation, and recreational activities with State College Meals on Wheels clients (primarily isolated older adults) and Penn State students. (45 participants took part in three IG events.)

Weaving Wisdom: An array of school- and community-based workshops, activities, and interactive exhibits that promote IG and intercultural conversations and understanding in diverse cultural contexts, including the Gullah/Geechee culture of the Lowcountry (South Carolina) and cultural arts of Ghana (West Africa). (125 residents of all ages took part in three IG events at the local library; 80 older adults took part in two OLLI courses taught by ILI fellows.)

Wholesome Fare for All Ages: Fun family activities that contribute to family bonding as well as family health. Includes Food That's Real for the Family Meal (a series of family gatherings and communal meals that provide opportunities to learn about, prepare, and enjoy healthful foods) and Qi Gong for Families and Friends (introductory workshops for teenagers and their parents and grandparents to come together for gentle exercises to train the body and mind). (50 residents, consisting of 40 adults and 10 children, participated in three events.)

IG Pen Pal Program enhancement: Program assessment and strategic planning for this program run by RSVP of Centre County (Pennsylvania). (Program improvements directly or indirectly affected 827 children, 380 adults, and 10 advisory group members.)

Montgomery
County^b

Beauty of Aging: High school photography students, after receiving aging sensitivity training, take portraits of older adults and photos of IG programs in action for high school art show and public library displays. (28 volunteers, 48 students.)

Family Connections: Expansion of the long-running Intergenerational Bridges mentoring program. To increase family involvement, mentors send biographical information, photos, and progress reports home with students. (Program improvements directly or indirectly affected 76 volunteers and 79 students and their families.)

Intergenerational housing: Meetings and site visits with county officials, nonprofits, and consultants to explore ways to create IG housing in Montgomery County. (Four ILI participants are active coplanners and participants in this ongoing series of meetings.)

Intergenerational program planning in schools: Quarterly and ongoing subcommittee meetings with school personnel and community leaders.

Note. ILI = Intergenerational Leadership Institute. IG = intergenerational. OLLI = Osher Lifelong Learning Institute.

^aInitiated by ILI participants in the 2016–2017 cohort. ^bInitiated by ILI participants in the 2015–2017 cohorts.

Discussion

The Challenge of Going from Learner to Participant to Leader

At the root of the ILI model is an emphasis on empowerment and leadership. In traditional senior volunteer programs that have a "management" orientation, emphasis is placed on channeling participants into existing volunteer roles, often with scripted tasks and set parameters for how they embrace these roles. In contrast, ILI participants are expected to be proactive in creating new programs and in negotiating roles for

themselves as part of the process. As noted in the "Introduction" section herein, the approach is one of self-directed volunteer leadership development.

However, we learned that it takes time and extended training and experience for individuals to develop the confidence and skills to take on leadership roles, particularly for those who are new to this field of practice. The monthly application sessions were crucial for helping ILI participants become more confident and competent in their programming skills.

Tools and Resources to Assist with Program Dissemination

Several tools and resources for supporting program dissemination have been developed.

- A resource manual includes information for new ILI chapter coordinators and instructors (Kaplan & Greenwood-Junkermeier, 2017). The manual includes PowerPoint slides, notes, and handouts.
- A website (<https://aese.psu.edu/extension/intergenerational/program-areas/intergenerational-leadership-institute>) highlights the ILI model and chapter accomplishments.
- A series of videotaped testimonials showcases how ILI participants view and experience the ILI program (Kaplan & Smith, 2017). The series consists of five short video compilations: "Meet ILI Participants" (4:43), "Lifelong Learning" (5:07), "Civic Engagement" (4:03), "Leadership" (5:20), and "Examples of ILI-Inspired Projects" (13:35).
- A set of train-the-trainer workshops titled "Establishing an ILI Chapter in Your Locality" provides information for originating ILI chapters. These workshops have been held in State College (October 25–26, 2017), and Seville, Spain (November 26–27, 2018). Participants from the first training have established ILI chapters in Durham, North Carolina, and Nelson, British Columbia (Canada).

We are moving in the direction of establishing a formal ILI Chapters Network. Network components being considered include an electronic mailing list of ILI chapter coordinators, collaborators, and participants and an expanded website with information on events, workshops, projects, curricular resources, and evaluation instruments.

Implications for Extension

ILI participants have solid communication, teaching, and intergenerational programming skills that could position them to make useful contributions to Extension programs that rely on volunteers, such as 4-H, the master gardener program, and some programs in the family and consumer sciences area. Upon graduation from the ILI program, each cohort of participants is provided with information on community volunteer opportunities, including those tied to Extension programs. Now that there is a growing pool of ILI fellows (graduates), we are beginning to see backend benefits for Extension—for example, one graduate from the State College chapter just completed training for Penn State Extension's Master Health and Wellness Volunteer program, which is based on national volunteer programs used in Extension.

The ILI has been added to a database posted on the U.S. Department of Agriculture National Institute of

Food and Agriculture website that provides information on over 70 adult development and aging-related programs developed by or offered through the Cooperative Extension System. We anticipate that inclusion in the database will provide added visibility of the ILI model and facilitate dissemination to other land-grant universities and their Extension systems, particularly those willing to embrace older adults as valuable resources for extending the reach and impact of Extension programs.

Conclusion

This article describes applications of the ILI model launched in two very different contexts. One was anchored in a university-based intergenerational research and practice center and the other in a large senior volunteer program administered through a multiservice regional nonprofit agency. According to data from the surveys and observations of short course sessions, monthly application sessions, and community meetings organized by ILI participants, the major ILI program objectives were achieved at both sites.

ILI participants gained a general introduction to the field of intergenerational practice, generated new ideas and plans for intergenerational programs, and, in most cases, were successful in implementing their program plans. In the process, they gained confidence and competence as budding intergenerational practitioners. They demonstrated wide-ranging skills development, including with regard to conducting effective outreach to organizations that serve age-diverse populations, building consensus and teamwork among partnering organizations, and planning and facilitating compelling intergenerational activities.

The success of ILI participants has implications for Extension and other organizations looking to expand their bases of motivated and skilled adult volunteers who could play significant roles in local programs designed to improve quality of life.

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