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*School of Occupational Therapy*

Creative Life Review Programming for Older Adults in Long-Term Care and Assisted Living

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A capstone project submitted in partial fulfillment for the requirements of the Doctor of Occupational Therapy degree from the University of Indianapolis, School of Occupational Therapy.

Under the direction of the faculty capstone advisor:

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## A Capstone Project Entitled

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By

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### **Abstract**

**Evidence:** Older adults in institutional settings experience limited participation in leisure occupations, often leading to depression and decreased life meaning (Chippendale & Bear-Lehman, 2012; Elias, Neville, & Scott, 2015). Life review is an enjoyable leisure activity for many older adults (de Guzman, Valdez, Peña, Quindao, & Quibol, 2017). Group life review offers additional benefits, including social interaction and cost-effectiveness (Elias, Neville, & Scott, 2015). Older adults sharing their story in a creative way encourages emotional processing (King, 2018). Finally, intergenerational exchange promotes positive attitudes of students toward older adults, and greater life meaning for older adults (Chippendale & Boltz, 2015a).

**Implementation:** An occupational therapy (OT) student introduced a creative group life review program with intergenerational exchange in a long-term care and assisted living facility. The program consisted of seven weekly sessions in each facility, where residents shared life stories in groups. The final session included sharing with elementary students. Residents, students, and the partnering school's guidance counselor reported enjoying the experience during sessions.

**Outcomes:** The OT student completed post-program interviews with residents, activity directors, and the school's guidance counselor. Several residents reported it was meaningful, and most stated they would participate again. Activity directors shared that residents enjoyed the group, and consistently looked forward to attending. The school counselor noted the students learned from and enjoyed the experience. To ensure sustainability, activity department personnel received a binder and in-person training including all program materials and relevant contact information. Life review provided a meaningful leisure occupation for residents in institutional settings.

### Creative Life Review Programming for Older Adults in Long-Term Care and Assisted Living

As a part of this occupational therapy (OT) doctoral capstone experience, creative group life review programs will be introduced in a long-term care (LTC) and assisted living (AL) facility to provide new opportunities for meaningful occupational engagement for residents. The programming will include an opportunity for intergenerational exchange between participating older adults and young children. The following literature review focuses on the impact of participation in life review groups as a meaningful leisure and social occupation for older adults in LTC and AL facilities.

#### **Older Adults in LTC and AL Facilities**

In the United States, the number of older adults utilizing paid assistance for care is steadily increasing (Harris-Kojetin et al., 2016). This includes the use of LTC and AL facilities, among other sources of care. Due to this increase in utilization of services, there is an increased need to address the health and wellness of older adults living in these settings. Aging has many potential consequences on the interconnected aspects of health, including decreased psychological, physical, and emotional well-being (Steptoe, Deaton, & Stone, 2014; Zanjani, Downer, Hosier, & Watkins, 2015). These issues can be compounded by placement in an institutionalized long-term care facility. Many older adults who move to LTC or AL facilities experience psychological, social, and emotional challenges associated with a change in living situation (Haugan, Moksnes, & Løhre, 2016; Plys, 2017). Mental health concerns, such as depression, loneliness, and anxiety are especially common in residents of LTC facilities, and Harris-Kojetin and colleagues (2016) noted that up to 48.7% of nursing home residents have a diagnosis of depression (Elias, Neville, & Scott, 2015; Gaggioli et al., 2014). Residents who experience depression may be more prone to disability and premature death, as psychological

and physical well-being are closely related (Crespy, Van Haitsma, Kleban, & Hann, 2016; Steptoe, Deaton, & Stone, 2014).

### **Occupation of Leisure**

Participation in the occupation of leisure is associated with improved mental health, and may act as a barrier to depression, low self-esteem, and meaninglessness in life for individuals in LTC facilities (Chao & Chen, 2018). Leisure helps older adults in institutionalized settings preserve their personal identity, enjoyment in life, physical health, and cognitive function (Causey-Upton, 2015). Leisure activities are also effective interventions for the well-being of individuals living in AL facilities, and can encourage increased social support, functional abilities, satisfaction with life, self-efficacy, self-growth, and decreased depression (Plys, 2017). In addition, participating in leisure provided through the facility is associated with improved integration of new residents into the social and physical environment (Plys, 2017). Individuals living in LTC facilities may experience limited engagement in leisure activities. While self-care is labeled as necessary, leisure activities are considered optional, and as a result there is a lack of time and effort spent on assisting residents with these activities in this care setting (Causey-Upton, 2015). In AL facilities, residents commonly report that leisure activities provided by the facility do not fit their wants, needs, and skill levels (Plys, 2017). In addition, fresh and varied activities are not often available in this setting (Plys, 2017).

### **Life Review**

Residents' needs for leisure participation are not currently being met in these settings. In order for leisure to positively correlate with health and well-being, activities must align with participants' interests and values (Plys, 2017). One activity associated with enjoyment and value for many older adults is reminiscence, or the recollection of past life events and experiences (de

Guzman, Valdez, Peña, Quindao, & Quibol, 2017; Henkel, Kris, Birney, & Krauss, 2017).

Reminiscence and life review are closely connected, as both include recalling and processing the past, however life review takes it a step further, by encouraging participants to re-analyze their experiences in order to resolve conflicts and understand the meaning of their lives (Satorres, Viguer, Fortuna, & Meléndez, 2018). Reminiscence has been cited as a non-stigmatized and cost-effective method to encourage positive mental health outcomes for aging individuals (de Guzman et al., 2017). Butler (1963) first noted the importance of reminiscence and life review for older adults. He reported through several case studies that life review was utilized by individuals nearing death to understand their experiences in life so far, and how these past experiences have impacted their present (Butler, 1963).

Recent life review interventions with older adults residing in institutional settings have resulted in positive outcomes. Elias, Neville, and Scott (2015) noted eight purposes served by reminiscing, including reinforcing self-identity, improving problem solving, preparing for death, teaching others, encouraging conversation, re-examining difficult or traumatic experiences, overcoming boredom, and maintaining memories of important people in the individual's life. Older adults participating in reminiscence experienced decreased depression, loneliness, and anxiety (Elias, Neville, & Scott, 2015). Chippendale and Boltz (2015a) applied an occupation-based life review program for individuals living in the community. They noted similar functions of the life review, including promoting a positive experience and well-being of participants, the opportunity to share with others, the value of sharing similar experiences and emotions with others, and increased meaning and purpose in life (Chippendale & Boltz, 2015a).

**Groups and life review.** Both aforementioned studies were completed with groups of older adults, rather than one-on-one sessions (Chippendale & Boltz, 2015a; Elias, Neville, &

Scott, 2015). Group reminiscence was preferred by Elias and colleagues (2015) due to the additional benefits offered through group sessions, including social interaction, improved communication, newly established social relationships, reduction of depression, and cost-effectiveness. King (2018) concurred that social contact is an effective method for decreasing depression in the older adult population. Lawrence & Paige (2016) speculated that hearing others' stories and experiences may lead to greater understanding of one's own experiences.

**Creativity and life review.** Some life review programs have been implemented with the addition of creative projects and expression. The life review program implemented by Chippendale & Boltz (2015a) included participants writing to express their stories. Another researcher applied creative writing instruction to a life review group, and noted that learning how to share their story in a creative way encouraged participants to utilize more emotional processing and derive greater benefits from the activity (King, 2018). The potential benefits of participating in creative group activities, such as writing, poetry, visual arts, music, theater, and dance include increased social support, quality of life, cognitive and affective function, and pleasure in activities for older adults (Noice, Noice, & Kramer, 2013).

**Intergenerational exchange and life review.** The positive impact of life review can be increased with the addition of intergenerational exchange. Chippendale and Boltz (2015b) stated that an intergenerational exchange consists of planned activities involving positive and beneficial interactions between individuals of different generations. As a part of their life review program, these researchers arranged an intergenerational exchange between health science students and the older adults participating in the program (Chippendale & Boltz, 2015b). During the intergenerational exchanges, each older adult shared a piece of their life story in the form of writing they had completed in the life review sessions, and participated in a semi-structured

discussion with participating students (Chippendale & Boltz, 2015b). The experience increased the positive attitudes of healthcare students toward older adults, and increased the older adults' sense of purpose and meaning in life (Chippendale & Boltz, 2015a; Chippendale & Boltz, 2015b).

The findings of this literature review suggest that the implementation of a creative group life review program with intergenerational exchange in a LTC and AL facility would constitute a valuable low-cost leisure and social participation occupation for residents. The program would potentially result in decreased depression, increased self-esteem, greater purpose in life, improved self-identity, decreased loneliness and increased social support, and more successful integration into a new living situation.

### **Theoretical Framework**

#### **Gerotranscendence**

This programming will be guided by the theory of gerotranscendence. Gerotranscendence is a theory of aging introduced relatively recently, in 1989, with a purpose to reconsider the disengagement theory of aging (Tornstam, 1989). Disengagement theory assumes that as an individual ages, they withdraw from society, and society simultaneously pushes them away to increase the ease of impending death for both parties (Tornstam, 1989). The disengagement theory has been widely criticized and discounted by professionals in the field of aging, however, Tornstam (1989) considered the possible merits of disengagement from society, if it is voluntary and aimed at the development of gerotranscendence. An individual who has achieved gerotranscendence may experience a greater connection to past generations, a decrease in fear of death, a reevaluation and appreciation for past experiences, an understanding of how the pieces of life fit together to form a whole, a deep confrontation of one's self, and a new



hopeful view of the future (Tornstam, 1999b). According to Tornstam (1989) these changes in thought processes are healthy and natural, which leads to increased satisfaction with life (Rajani & Jawaid, 2015).

This theory is a suitable guide for life review programming with older adults, as many of the potential outcomes of a group life review program align with the tenets of gerotranscendence. Older adults participating in life review may reflect on both positive and negative life experiences, integrate the experiences into the whole of their lifetime, resolve past conflicts, and understand how their past experiences are connected to their present and future selves (Hsiao et al., 2018; Zanjani et al., 2015). These reflections act as catalysts for participants to reconstruct their view of themselves and the world around them, shifting their thinking toward transcendence (Hsiao et al., 2018; Tornstam, 1999a).

### **Psychodynamic Frame of Reference**

The psychodynamic frame of reference (FOR) will be used as a model to guide the day-to-day design and implementation of life review programming. The psychodynamic FOR is based on the model of psyche introduced by Freud (1953). According to Freud (1953) the id, ego, and superego make up an individual's psyche. The id controls primitive instinct and instant gratification, the superego is concerned with morality and ethics, and the ego is considered logical and balances the id and superego (Freud, 1953). If the id, ego, and superego are not balanced properly, it can lead to aggression, anxiety, depression, and other counterproductive forms of expression (Cole & Tufano, 2008). In order to have a healthy ego, and therefore balanced psyche, an individual must have a strong sense of self, an understanding of reality, a sense of control, and sound thought processes (Cole & Tufano, 2008).

To aide in development of these aspects of self, an individual may eliminate conflicts and fixations, express themselves appropriately, participate productively in groups, and ensure their sense of self is adequately defined (Cole & Tufano, 2008). Each activity completed in these group life review sessions will be designed with the promotion of ego development in mind, and program activities will promote creativity and reflection on life experiences. This will support improved mental health outcomes for participating older adults.

The introduction of creative group life review programs with intergenerational exchange in a LTC and AL facility will provide new opportunities for meaningful occupational engagement for residents. Based on findings described in this literature review, the increased social and leisure participation has the potential to reduce depression, improve self-esteem, and increase feelings of meaning and purpose in life. To further promote these outcomes, the life review activities will be framed according to the theory of gerotranscendence, and the psychodynamic FOR.

### **Screening and Evaluation**

For this project, needs assessments were completed in a LTC and AL facility. These needs assessments were used to analyze the social and leisure occupational engagement of residents, the need for life review programming, and the most effective ways to implement programming in each facility. As a part of the needs assessment, one-on-one in-person interviews were completed, and an analysis of strengths, weaknesses, opportunities, and threats (SWOT) was developed. The SWOT analysis was used to increase understanding of the setting and population prior to beginning the project (Bonnel & Smith, 2018). The needs assessment is an important piece of a clinical project, as it helps maintain the goal of continuous quality improvement in a setting (Bonnel & Smith, 2018).

### **Needs Assessment in Long-Term Care and Assisted Living Facility**

Semi-structured interviews were completed with residents and activity staff in each facility to gather additional information regarding the fit of the program, and anticipate participation in the programming. See Appendix A for questions included in interviews with residents and activity directors. Administrators provided a list of residents in each facility who could be interviewed as part of the needs assessment. All interviews were completed one-on-one by the student. Interviews with activity directors in the LTC and AL facility took place in each respective activity room, and interviews with residents took place in their individual rooms. The number of interviews completed in each facility are displayed in Appendix A. The questions included in each interview are presented in Appendix B. The interviews helped develop a well-rounded SWOT analysis related to participation in the occupations of leisure and social participation, and the life review programming in each facility.

The SWOT analysis revealed strengths in both the LTC and AL facilities including organized and well-developed activity programs, passionate activity staff, and large areas with tables for activity participation. In addition, the activities in each facility are effectively advertised and many residents participate consistently. For example, in the LTC facility, each resident receives a monthly activity calendar, has access to signage throughout the facility promoting scheduled activities, and each activity is announced overhead half an hour before beginning. In the AL facility, residents also receive monthly calendars and have access to an activity schedule outside the activity room at all times. The administrative and activity staff in both facilities are supportive, and have provided contact information and guidance regarding which residents to speak with in each facility. They also added the life review program to the monthly activity calendar in each facility to assist with promoting the program.

Weaknesses were also identified, and while several residents in the LTC facility enjoyed the activities provided through the facility, one noted a deficit in higher level cognitive activities, such as poetry and writing. One resident living in the AL facility noted a need for novel activities, stating that since she had already done all the activities once there was no need to repeat them. Decreased social interaction between residents was also noted by a majority of residents in both facilities. In addition, there were very limited formal opportunities for reminiscence and life review offered in the LTC facility, and none in the AL facility. Finally, in the LTC facility, the activity director reported there are few leisure activities offered each month in which residents physically create a product, while there are a few more opportunities for creative and physically engaging activities in the AL facility, such as cooking and crafting. Miller (2016) found these weaknesses were noted in other LTC facilities, where residents requested more stimulating and creative activities which related more closely to their life experiences and interests. Pys (2017) reported there was a mismatch between activities offered in many AL facilities and activities desired by residents. Decreased social interaction could also be considered a weakness, as social engagement is an important aspect of successful aging (Jang, Park, Dominguez, & Molinari, 2014).

Opportunities included two local schools near the facility and passionate staff willing to assist with programming. The activity director in the LTC facility reported that children from the nearby elementary school used to frequently visit the facility, however they have not had the connection recently. She expressed a need to renew the relationship, due to residents enjoying the interaction with young children. Another opportunity regarding life review programming was revealed through individual resident interviews, with several individuals reporting they enjoy thinking about their past, and typically only have opportunities to reminisce with family

and close friends. The activity director at the AL facility noted that while reminiscence is never formally planned, it often occurs naturally during activities. All interviewees found the occupation of leisure important, and noted meaningful activities they participate in when able. This further established the importance of participation in leisure in older adults' lives, as reported by several researchers. Participation in leisure is associated with decreased depression, improved self-esteem, increased meaningfulness in life, greater physical and cognitive health, improved personal identity, and enjoyment in life for individuals in LTC and AL facilities (Causey-Upton, 2015; Chao & Chen, 2018; Plys, 2017).

Threats in both facilities were related to the large quantity of activities already offered, and the lack of commitment in multiple program sessions anticipated by residents. There are several activities offered daily at each facility, and with busy activity schedules, many residents reported they were unwilling to commit to attending several sessions of the life review programming. Inconsistent or lacking attendance to sessions threatens the potential positive impact of participation in the program for residents.

In the LTC facility, approximately half of the residents interviewed stated they may be interested in life review programming. In the AL facility, a significantly smaller proportion of interviewees were interested in participating in the programming. None of the residents in the AL facility reported being bored throughout their day, as they had reading, group outings, napping, socializing, and other hobbies to participate in, while several residents in the LTC facility noted an occasional lack of leisure activities in their day. Regarding logistics, residents in both facilities who were potentially interested in participating noted that activities in the afternoon would be easier for them to attend.

### **Needs Assessment in other Practice Areas**

The practice area plays an important role in the process of a needs assessment. In this LTC and AL facility the needs assessment consisted of one-on-one interviews due to the proximity of residents' living spaces. It was time-effective to travel to each residents' room to gather in-depth information through interviews in both facilities. The activity directors control a majority of programming in these facilities, and as a result they were important resources for the needs assessment. In this setting the focus of OT intervention is typically self-care rather than leisure or social occupations (Causey-Upton, 2015). As a result, the occupational therapists would not be responsible for implementing leisure-based group programming, and were not formally addressed as a part of this needs assessment. However, OT practitioners and certified occupational therapy assistants (COTA) in the facility noted the value of meaningful leisure activity and social participation for residents. One COTA specifically communicated the importance of sharing and hearing life stories when working with the geriatric population.

A needs assessment conducted in an in-patient mental health facility may also include patient interviews, due to participants staying in the facility in close proximity. However, in this practice area it would be more pertinent to interview occupational therapists, because therapists in this setting may conduct more group interventions focused on social participation and reflection. Bullock & Bannigan (2011) noted that group work was commonly utilized by occupational therapists working in mental health. As a result, a group program focusing on leisure and social occupations would more likely be instituted by an occupational therapist in this setting than in LTC.

In the practice area of home health, a needs assessment would have very different features than in an in-patient setting, such as LTC, AL, or in-patient mental health. Since

participants would likely not live in close proximity to each other, it would be more time and cost-effective to mail surveys or questionnaires, or complete phone interviews, rather than one-on-one in-person interviews. In a home health setting, the relevant professionals to interview for a needs assessment would also be different than at an in-patient setting. A home health agency would likely not have an activity director on staff, and as a result, it may be most beneficial to interview therapists, nurses, and other staff who spend time with patients about the social and leisure participation needs going unmet through current therapeutic intervention.

The needs assessment performed in the LTC and AL facility identified a need for increased leisure participation, especially in the LTC facility. Interviews and analysis also revealed a lack of social participation between residents in both facilities, inadequate opportunities for mentally stimulating activities, and a deteriorating relationship between the facilities and the nearby elementary school. These results indicated needs which could potentially be addressed in creative group life review programming with intergenerational exchange. The opportunities available at the site, including supportive administrative staff, the nearby elementary school, and the enjoyment of leisure and reminiscence activities for residents make implementation of this programming feasible.

### **Program Implementation**

This doctoral capstone experience included two main interventions. The first intervention was the design and implementation of creative group life review programming with residents in a LTC and AL facility. The life review sessions took place once weekly for 45 minutes in each facility with small groups of residents lead by the OT student. The sessions were listed on the residents' activity calendars for each month of the program's implementation. The OT student delivered flyers to prospective participants each week to further advertise for the

activity. In addition, activity staff announced each session overhead, and assisted with gathering residents to participate when needed. Each session focused on a different theme from life, including favorite places in childhood (Aşiret & Dutkun, 2018; Satorres et al., 2018), firsts in young adulthood (Tamura-Lis, 2017), work life (Hsiao et al., 2018), home life and relationships as an adult (Aşiret & Dutkun, 2018; Tamura-Lis, 2017), favorite holidays and traditions (Aşiret & Dutkun, 2018), and health and the body throughout life (Zanjani et al., 2015). The variety of topics were determined through a literature review, and utilized to guide participating residents through a thorough review of their lives.

During each session, residents:

1. Completed a short warm-up to become acquainted with other group members and the group leader.
2. Listened to the educational concepts and instructions associated with the activity.
3. Spent approximately 15 minutes completing a creative activity and reviewing a short worksheet with questions pertaining to the topic.
4. Shared their creative product and responses to the worksheet with the group.

Creative activities included drawing a favorite place, writing a short story of an experience, creating an inspirational work ethics poster, decorating cutout paper people to represent family members and relationships, choosing colors to symbolize holidays and traditions, and drawing palms to appreciate changes in the body developed through the years.

While the group leader encouraged residents to complete the creative activities during each session, group members rarely actually participated in this piece of the program. The group leader assisted with grading the difficulty of each activity up or down to encourage participation from all residents, regardless of cognitive or physical abilities. This included changing the font



size, number of materials used, and steps in each activity to match the participants' abilities (Tamura-Lis, 2017). However, many residents reported they were not artists, and could not complete the activities successfully. Instead, most group members spent time answering the worksheet questions prior to discussion, and shared their responses with the group. Following sharing, residents discussed memories with each other and compared their experiences to what people may typically experience today in similar situations. The group leader facilitated these conversations through discussion questions. See Appendix C for an example of a typical session design, derived from session designs found throughout *Group Dynamics in Occupational Therapy: The Theoretical Basis and Practice Application of Group Intervention* (Cole, 2005).

The second intervention associated with the life review programming was the design and implementation of an intergenerational exchange in each facility between older adults and elementary school students. The principal and guidance counselor at the elementary school assisted with selecting fourth and fifth grade students, and obtaining permission for them to participate. Prior to them joining the program, the OT student educated the fourth and fifth grade students on successful interaction with older adults, and details of the upcoming experience through a short presentation. The presentation covered topics including how to address decreased hearing and confusion, as well as how to demonstrate active listening and respect.

Seventeen fifth grade students met with residents in the AL facility, and 21 fourth grade students met with residents in the LTC facility to share life stories and experiences. Participants were placed in groups of three to five students with one or two older adults. Students and residents were provided with a list of questions as a guide on what to ask group members, and were encouraged to ask questions, actively listen to the responses, and share their own experiences. Many of the questions were related to topics reviewed during the previous life

review sessions with residents in each facility. Following this activity, the group leader facilitated further discussion and comparison through discussion questions presented to the whole group of older adults and students in each facility.

### **Implementation and Leadership**

Leadership skills were necessary for effective coordination of individuals in the LTC facility, AL facility, and elementary school for implementation of the life review programming and intergenerational exchange. The student communicated the goals of the life review programming and its relation to OT to the administrator at the LTC and AL facility, activity directors and staff at each site, and residents living in each facility to assist with organizing the program and recruiting participants. In addition, the student shared the goals related to the intergenerational exchange with the principal and guidance counselor at the local elementary school to help organize the event and recruit students to participate.

Receiving feedback on all aspects of the program was an important part of ensuring implementation was successful. Feedback was provided by the site mentor, activity directors, residents, and residents' family members. Feedback was utilized to increase the success of the program, regarding sustainability, participation, and enjoyment of the residents. In addition, the student utilized problem-solving when meeting with activity directors and school officials to plan the timing, location, and participants for the intergenerational exchange aspect of the program.

Finally, maintaining organization, keeping a schedule, and practicing initiative were vital to the success of the programming. There were many tasks which needed to be accomplished each week, including recruiting residents to participate, designing activities, creating and printing documents, meeting with activity staff and directors, and leading group sessions in each facility. Especially due to the site mentor typically working off-site, it was important to be self-directed

and practice initiative to complete all tasks associated with program development and implementation.

### **Implementation and Staff Development**

Staff development was promoted throughout the implementation phase of the life review programming. The student utilized communication about the program to increase knowledge of the scope of OT practice for activity directors and staff, as well as administrators at the local elementary school. Activity directors and administrators were also educated on the occupations of leisure and social participation, through explanation of the focus and purpose of the program. The student educated activity staff on OT, the potential benefits of life review and reminiscence, and basic information regarding how to implement the life review programming during the implementation phase of this intervention. In addition, while the OT staff at the facility did not participate directly in the intervention, the discussion of the program reignited their consideration of the importance of leisure and social participation in their individual clinical practice.

The implementation phase spanned a total of seven weeks, with two to eight residents attending each weekly session in both facilities. Residents, family members, students, and school administrators reported enjoying the experience during sessions. The implementation phase was supported by the communication and organization skills exhibited by the OT student, as well as the assistance and guidance from the site mentor, administrators at both facilities, activity directors and staff, and elementary school administrators.

### **Outcomes and Discontinuation**

Continuous quality improvement (CQI) involves understanding a clinical problem and utilizing best-practice methods to resolve the issue (Bonnell & Smith, 2018). This process includes many possible steps, such as needs assessments, literature reviews, and outcome

evaluation to ensure the solution is safe and effective (Bonnell & Smith, 2018). Quality improvement and project outcomes were considered throughout the program planning, implementation, and discontinuation phases. The OT student supported CQI by soliciting feedback about the program throughout the implementation and discontinuation phases from the site mentor, activity directors, activity staff, and residents in both facilities. Feedback was utilized to update creative activities, create effective advertisement flyers, and secure a comfortable and functional location and schedule for weekly sessions. In addition, the student created a goal-attainment scale, and referenced it throughout program implementation and discontinuation to ensure goals were met.

### **Outcomes and Sustainability**

**Post-program interviews.** Several steps were taken to ensure CQI and sustainability of the life review program and intergenerational exchange sessions. Post-program semi-structured interviews were completed by the OT student one-on-one with participating residents, activity directors in each building, and the local elementary school guidance counselor. Reference Appendix D for detailed information regarding who was interviewed in each facility. The interview guides for all post-program interviews are included in Appendix E. Feedback from all interviewees was referenced to edit and finalize program session guides, activity worksheets, and materials for future implementation.

Most residents indicated they enjoyed the life review programming and intergenerational exchange. Several residents in both facilities reported they found it meaningful to share and listen to stories and experiences from the past. In addition, all residents interviewed who attended life review sessions as well as the intergenerational exchange session noted that the discussion with the elementary school students was their favorite part of the program. One

resident reported she would have liked to hear more of the students' personal questions during the intergenerational exchange, rather than simply the questions provided by the group leader. A majority of residents interviewed reported they would participate in life review and intergenerational exchange again if it were offered in their facility.

Activity directors in both facilities shared positive and constructive feedback from residents and staff, as well as their own observations. Both directors shared that residents appeared to enjoy reminiscing with the group leader, other residents, and especially the elementary students. The activity director in the LTC facility noted that several residents attended nearly every session of the program, indicating that they looked forward to it and enjoyed participating each week. In the AL facility, the activity director shared her insights on how to improve participation in future implementation of the program, by decreasing the focus on creative activities when advertising for each session to avoid intimidating potential participants.

The elementary school guidance counselor provided feedback regarding her experience attending both intergenerational exchange sessions. She stated that some students shared with her that the experience was fun and interesting. She commented that the students not only learned about history, and the lives of older adults, they also learned how to interact with individuals outside of their age range and abilities. The guidance counselor noted that the students quickly learned to adapt their speaking and conversation to accommodate their older partners. She also felt the pre-session education about hearing loss and communicating with older adults was very valuable, and would be important to include in future repetitions of the program.

**Sustainability.** In order to sustain the implementation of the life review programming and intergenerational exchange, activity directors and staff in each facility received a binder including all session guides, activity worksheets, and miscellaneous materials needed to conduct the life review sessions. This information also included contact information for the elementary school, information used to prepare students to participate in the exchange, and the activity worksheet utilized for the intergenerational exchange.

In addition, the OT student utilized the activity binders to train two activity staff members in the LTC facility, and the activity director in the AL facility to implement the programming independently. This training consisted of approximately 30 minutes of in-person training with the OT student. Each facility staff member participating in the training asked questions as needed to ensure understanding of the material. Activity directors and staff were also educated once more on the importance of participation in leisure and social occupations, and the potential benefits of intergenerational exchange to further encourage sustainability. Finally, feedback from residents and the elementary school guidance counselor were shared with the activity directors and staff at this time.

### **Response to Societal Needs**

This creative group life review and intergenerational exchange programming meets societal needs in several ways. Through creative group life review and intergenerational exchange, the meaningful leisure and social participation needs of older adults in institutionalized settings are addressed. Older adults living in institutional settings often experience limited participation in meaningful leisure occupations, due to the focus on self-care (Causey-Upton, 2015). This aspect of institutionalized care is associated with decreased wellbeing, depression, loneliness, anxiety, boredom, poor self-perception, and decreased feelings

of meaning and purpose in life (Causey-Upton, 2015; Chippendale & Bear-Lehman, 2012; Elias, Neville, & Scott, 2015). Reminiscence is an enjoyable leisure activity for many older adults (de Guzman, Valdez, Peña, Quindao, & Quibol, 2017), and therefore has the potential to provide residents in institutional settings with a meaningful leisure occupation. In addition, since the life review in this program includes group sessions with other older adults, as well as elementary school students, the program encourages social participation.

An intergenerational exchange program also has the potential to increase positive perceptions of older adults for younger generations (Chippendale & Boltz, 2015b). Older adults may require more physical, financial, and social support as they age, and as the population of older adults continues to grow, there is a need for younger generations to increase their support and care for this population (Harris-Kojetin et al., 2016). Fostering more positive perceptions of older adults in these younger generations may help prepare them to respond appropriately to this need in society.

It is clear that the provision of a creative group life review program with intergenerational exchange has the potential to meet societal needs for increased meaningful leisure and social participation for older adults in this setting, and improved perceptions of older adults for younger generations. Subjective interviews with participants in, and observers of, this program demonstrated the enjoyment, meaningfulness, and learning associated with it. The implementation of this type of program in other similar facilities may lead to improved mental and social health for older adults, as well as more effective care from younger generations.

## **Overall Learning**

### **Professional Communication**

Professional communication in written, oral, and nonverbal forms was practiced throughout this experience. The goals of the life review programming and its relation to OT were verbally communicated to the administrators at the LTC and AL facility, activity directors and staff at each site, and residents living in each facility to assist with organizing the program and recruiting participants. In addition, the goals related to the intergenerational exchange were communicated verbally to the administrators and staff members at the LTC and AL facility, as well as through email and verbally to the principal and guidance counselor at the local elementary school to organize the event and recruit students to participate.

The OT student distributed flyers with large print, and verbally communicated with residents in the LTC and AL facility to remind them of the program schedule and topic each week. In addition, written, oral, and nonverbal communication were all utilized during life review and intergenerational exchange group sessions. The OT student used effective verbal and nonverbal communication to ask questions, appropriately listen to responses, and redirect conversation when necessary. This communication included speaking loudly and clearly, repeating statements as necessary, and using appropriate facial expressions and gestures (Tamura-Lis, 2017). In addition, all activity worksheets utilized by residents contained the main discussion points for each topic to aide in understanding when it was difficult to hear the verbal questions (Tamura-Lis, 2017). These resources were also printed with large font size to increase ease of reading for individuals with decreased vision (Tamura-Lis, 2017).



**Leadership and Advocacy**

The OT student utilized leadership and advocacy skills consistently throughout the doctoral capstone experience. Leadership was demonstrated through effective communication with all parties involved in the organization, implementation, and discontinuation of the program. In addition, the student lead life review and intergenerational exchange sessions, utilizing effective communication skills, confidence, and organization. Finally, the student accepted constructive feedback professionally from residents, family members, activity directors and staff, and the site mentor. This feedback was utilized to integrate needed changes into the student's performance and improve leadership skills.

The OT student provided education to residents, family members, staff at both facilities, school administrators, and the site mentor to advocate for the program and OT. These individuals were educated on OT, as well as the importance and benefits of leisure participation, social participation, and life review. This advocacy was important to increase interest in the life review program, ensure understanding of these occupations, and to empower residents to participate in leisure occupations of their choice. In addition, in the process of preparing the elementary school students for the intergenerational exchange sessions, the OT student educated them on OT, and the importance of the profession.

The creative group life review program and intergenerational exchange sessions offered new social and leisure occupational participation opportunities for residents in institutional care. The OT student planned, implemented, and discontinued the program with the support and guidance of a faculty mentor, a site mentor, administrators at the LTC and AL facility, activity directors and staff in both facilities, residents, and administrators at the local elementary school. Continuous quality improvement and sustainability of the program, advocacy for OT and

occupational participation, and professional development were addressed throughout all phases of the doctoral capstone experience.

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## Appendix A

## Number of Interviewees in LTC and AL facilities

<u>Interviewee Title</u>	<u>LTC Facility</u>	<u>AL Facility</u>
Activity directors	1	1
Residents	8	8

*Note.* Residents and activity directors were interviewed by student one-on-one. LTC = long-term care; AL = assisted living.

Appendix B  
Needs Assessment Interview Guides

Activity Director Interview:

1. What types of activities are offered for long-term care (LTC)/assisted living (AL) residents? Do you do any writing, arts and crafts, or ice breaker activities?
2. How do you determine what types of activities to offer?
3. How often are activities held?
4. Are there any activities that are consistently repeated?
5. Do you have consistent participants? Are there particular individuals who participate in programming frequently?
6. How do you recruit participants for activities?
7. How do you handle logistics, such as scheduling, location, space, and materials?
8. Is there potential opportunity for additional programming or changes to programming currently offered? Do activities change frequently?
9. How do you ensure safety and comfort with participants during activities?
10. What is the procedure for participants who may become upset during activities?
11. Do you ever leave the facility for activities with residents? Do you ever bring other individuals in to the facility for activities?
12. Would you be willing to assist with determining which residents may be most likely to participate?

Resident Interview:

1. What do you do in your free time?
2. How often do you feel bored?
3. How do you feel when talking with individuals who are close to you in age?
4. How do you feel when talking with individuals who are younger or older than you?
5. How often do you interact with other residents in the facility?
6. How often do you participate in activities provided by facility?
7. What types of activities are your favorite?
8. What types of activities are you least interested in?
9. Why do you or do you not participate in activities?
10. What types of activities do you wish the facility would provide? What types of activities would you like to participate in?
11. How do you feel when thinking about past events in your life?
12. How often do you have the opportunity to share stories about your life with others?
13. How do you feel when sharing stories from your life with others?
14. How would you feel about participating in a weekly activity to review and share your life story creatively?
15. What time of day would you be most likely to participate in programming?



Appendix C  
Life Review Session Guide

Date:

Group title: Life Review

Session title: Childhood Memories

Format: (45 min)

Warm-up – 5 minutes

Introduce/instructions for activity – 5 minutes

Activity – 15 minutes

Discussion – 15 minutes

Summary – 5 minutes

Supplies: Printer paper, construction paper, pencils, colored pencils, crayons, and session 1 activity worksheet

Description:

1. Introduction:

- a. Warm-up – State your name and where you grew up.
- b. Educational concepts – This is the first session of an 8-week life review program. You are in no way committed to coming to all 8 sessions, however, if you enjoy your time today I would encourage you to come to as many sessions as possible. Life review and reminiscence can have many possible health benefits, including improved mental health, improved memory, and increased social support. Today we will be thinking about childhood. We will focus on memories of where you lived when you were young, and who you lived with.

2. Activity:

- a. Instructions – The activity for today is a piece of artwork representing a favorite or meaningful place in which you lived or spent a lot of time when you were a child. This could be a bedroom, living room, back yard, school, or anywhere significant to you. After the activity, I will allow everyone the opportunity, if they would like, to share their picture, talk about the place they drew, and why it is important to them. You can draw your picture as realistically or abstractly as you would like. There is no wrong answer, this is simply an activity to express your memories in a different way!
  - i. Opportunity for adaptation: If you would prefer, you can answer the printed list of questions about your location/room/area instead of drawing a picture.
- b. Pass out materials – Here is a piece of paper and pencil for each of you. Coloring materials are distributed around the table.
- c. Complete activity – We will take approximately 15 minutes to work, then see where everyone is at in their process.

3. Sharing:

- a. Members share project with group.
  - i. Would anyone like to share about the place they drew?
  - ii. Examples of questions to ask during sharing: What place did you draw? Why was this place important to you? Who does this place make you think of? Who did you spend time with in this place? (parents, siblings, friends, pets, etc.)

- iii. Take turns sharing your responses to the worksheet.
- 4. Processing:
  - a. Questions for discussion:
    - i. How did you feel when thinking about memories from so long ago?
      - 1. Did you think of more positive or negative memories when drawing this place?
    - ii. Were certain pieces of the memory more clear to you than others? Which pieces? Why might that be? (were certain parts more valuable/meaningful to you?)
- 5. Generalizing:
  - a. Questions for discussion:
    - i. How do your memories compare with others? Did anyone draw similar places?
    - ii. What seemed to be the most impactful places for the group?
- 6. Application:
  - a. Questions for discussion:
    - i. How will you use your drawing? Will you reminisce with family/children/friends?
    - ii. What could your children/grandchildren/young friends learn from your childhood memories?
- 7. Summary:
  - a. Summarize what happened in the group today, and what will be covered next week.
    - i. Today we reminisced on childhood, specifically where we grew up and who we grew up with. Hopefully this activity helped you remember the things you learned as a child, and what you have to share with and teach young people. Next week we will reminisce about your teenage and young adulthood years.

*Note. Session design derived from *Group Dynamics in Occupational Therapy: The Theoretical Basis and Practice Application of Group Intervention* (Cole, 2005)*

Appendix D  
Number of Post-Program Interviewees

			<u>Elementary</u>
<u>Interviewee Title</u>	<u>LTC Facility</u>	<u>AL Facility</u>	<u>School</u>
Activity directors	1	1	
Residents	5	5	
Guidance counselor			1

*Note.* Interviews were completed by student one-on-one. LTC = long-term care; AL = assisted living.

Appendix E  
Post-Program Interview Guides

Activity Director Interview:

1. What feedback have you received from staff or residents regarding the life review programming?
2. What evidence have you seen about the meaningfulness of the program for residents who participated?
3. What constructive feedback do you have regarding the life review sessions and intergenerational exchange?
4. What suggestions do you have for ensuring sustainability of this program at the facility?
5. The most unique aspect of this program is the intergenerational exchange. What suggestions do you have to encourage the sustainability of this part of the program?

Resident Interview:

1. What did you enjoy about the life review program?
  - a. What would you have changed?
2. What did you enjoy about the intergenerational exchange?
  - a. What would you have changed?
3. How did you learn about the program?
4. How likely would you be to participate in life review at another time if it were provided by the activity director in your facility?
5. How did you feel about the length of the sessions?
6. Were there any important life topics you felt we did not cover?
7. In what ways did you feel the life review sessions and intergenerational exchange were meaningful?
8. Is there anything else you would like to share with me?

Guidance Counselor Interview:

1. How did you determine which students to recruit for the experience?
2. What feedback did you receive from students or participating staff regarding this experience?
3. In what ways do you feel this experience may have been valuable for the students?
4. What were your observations regarding the value of the experience for residents at the facility during the intergenerational exchange sessions?
5. What suggestions do you have to make it easier for the school to be involved in replicating this program in the future?