Orange County Department on Aging
Capstone Summary Report (2013-2014)

Implementation of Project EngAGE: A Leadership Initiative to Improve the Health and Quality of Life of Older Adults in Orange County, NC

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Honor Code:
On our honor, we have neither given nor received unauthorized assistance while preparing this assignment.
Abstract

Background: The world is aging, creating both challenges and opportunities for improving quality of life for older adults. The number of people worldwide aged 60 years and over is projected to increase from 605 million to 2 billion between 2000 and 2050, doubling from about 11% to 22% of the population in the same time period. North Carolina and Orange County match the national aging trends. The Orange County Department on Aging (OCDOA) Master Aging Plan (MAP) outlines pertinent areas to improve the quality of life for older adults living in Orange County. Project EngAGE is a 12-week action-oriented senior leadership program that addresses two major goals of the MAP: (1) information dissemination and (2) service gap resolution. In Project EngAGE, senior leaders are trained to become resource leaders who address concerns in their communities. Upon graduation from Project EngAGE, senior leaders organize themselves in Senior Resource Teams (SRTs) to collaborate on community projects.

Methods: Two major activities were conducted during the Capstone project: (1) development of Project EngAGE and (2) implementation of the first phase of Project EngAGE. To develop Project EngAGE, we established long-term goals, adapted the existing Haywood County EngAGED curriculum to meet the needs of Orange County older adults, and created an evaluation plan and tools for the program. Subsequently, to implement Project EngAGE, we recruited for the program and managed program logistics such as budget creation, session planning and coordination, program facilitation and program evaluation.

Results: Our key findings can be sorted into two groups: (1) results from development of Project EngAGE and (2) results from implementation of Project EngAGE. Within the development of Project EngAGE, we created the mission statement, goals, objectives, and logic model for Project EngAGE that informed the development of 12 lesson plans to address a variety of topics. Each lesson plan contains a brief description of the session, objectives, key knowledge points, methods, operational materials, an agenda of the class, and resources related to the topic. The evaluation plan and tools guided the Capstone team to ensure that all of the data were properly collected throughout the implementation of the program. During the implementation of Project EngAGE we recruited 15 senior leaders, exceeding our goal of 10-12, through personal interviews, snowballing and promotional materials. The participants came from a variety of rural communities, including three participants from Bingham, four participants from Little River, and one participant from each of the following communities: Cedar Grove, Mebane, Eno, and New Hope. The implementation of the program led to the development of handouts that can be utilized for future iterations of the program. Additionally, the utilization of the evaluation tools led to a multitude of data that was interpreted and presented in the evaluation report. Feasibility, reach, satisfaction, and fidelity were all achieved. Project EngAGE also resulted in 100% completion rate of the program, an increase in sense of community amongst participants, and high intention to participate in Senior Resource Teams.

Discussion: Our Capstone project has significant implications for OCDOA as well as for older adult development, leadership, and volunteerism programs in other settings. The first cohort of Project EngAGE graduates are prepared to act as resource leaders in their respective communities, which will affect how OCDOA will gather information about the needs of Orange County citizens, design programs, and disseminate information to intended recipients of -- or participants in -- their programs. Furthermore, the process of planning and implementing Project EngAGE has created a framework for future iterations of the program that will aid in sustaining the program and network. More globally, the process evaluation findings indicate that this adaptation of Project EngAGE from the Haywood EngAGED model was acceptable and satisfactory to all stakeholders -- program participants, OCDOA staff and administrators, Advisory Committee members, and student implementers. Short-term outcome evaluation findings indicate that Project EngAGE retains the core components of a successful senior leadership program.
Acknowledgments

We would like to thank all of those who helped make this project a success. We thank the Orange County Department on Aging staff, and specifically our preceptors, Janice Tyler and Mary Fraser, as well as Kathie Kearns, Latonya Brown, and Cherie Rosemond. We would also like to thank our faculty advisors, Dr. Jason Smith and Dr. Angela Thrasher, and our teaching team, Meg Landfried, Melissa Cox, and Christine Agnew-Brune. The Orange County community was a key partner in Project EngAGE’s success. We thank the Project EngAGE Advisory Committee and the many guests and community agencies involved in Project EngAGE. Finally, we would especially like to thank the participants in the inaugural Project EngAGE class for their commitment and passion to this program.
Acronyms and Public Health Terms

**CDC:** Centers for Disease Control and Prevention

**COSC:** Central Orange Senior Center
Central Orange Senior Center (COSC) is a senior center located in Hillsborough North Carolina where most of the Project EngAGE sessions will be held. COSC offers a variety of programs including classes, wellness programs, trips and lunches.

**MAP:** Master Aging Plan, 2012
The Master Aging Plan (MAP) is a strategic plan for OCDOA. In 2000, the OCDOA was the first county in North Carolina to create a five-year MAP. Today, the 2012-2017 MAP is community oriented and includes public input throughout every step. MAP is dedicated to the promotion of equity around the county.

**MPH:** Master’s of Public Health

**OCDOA:** Orange County Department on Aging
The Orange County Department of Aging’s (OCDOA) mission is “to provide leadership in planning and operating a system of integrated aging services through state of the art senior centers, serving as focal points for coordinated community and individualized programs designed to educate seniors and their families and maximize the health, well-being, community engagement, and independence of older adults at all functional levels” (MAP, 2012)

**SDV:** Self-Directed Volunteer

**SMART:** Specific, Measurable, Attainable, Relevant, and Time-Bound

**SRTs:** Senior Resource Teams

*Senior Times:* Quarterly newspaper with news and events for older adults published by OCDOA
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Introduction

Capstone Project and Project EngAGE

Capstone is a team-based, mentored, and evaluated service-learning opportunity designed to improve Master’s students’ skills while aiding the work of local partner organizations and improving public health. This yearlong project is a requirement of the Department of Health Behavior, Master’s of Public Health (MPH) curriculum at The University of North Carolina at Chapel Hill Gillings School of Global Public Health. Five MPH in Health Behavior candidates formed the student team responsible for this Capstone project. The Capstone community partner was the Orange County Department on Aging (OCDOA) and the Capstone team’s preceptors were Janice Tyler, Department Director, and Mary Fraser, Director of Aging Transitions.

OCDOA & Project EngAGE

OCDOA provides services for Orange County’s older adults and their caretakers, with their mission being “to provide leadership in planning and operating a system of integrated aging services through state of the art senior centers, serving as focal points for coordinated community and individualized programs designed to educate seniors and their families and maximize the health, well-being, community engagement, and independence of older adults at all functional levels” (Goldberg, Major, Perritt, Prentice-Dunn, & Woodruff, 2012). OCDOA provides a variety of programming through its senior centers that include wellness and exercise-based classes and activities, entertainment opportunities, and communal lunches. Additionally, OCDOA offers aging transition services that assist older adults in finding the resources they need to age well and independently. These services include support accessing social services, long term and short term care planning, and an aging helpline. OCDOA also houses the R.S.V.P. volunteer program that matches adults, aged 55 and older, with community volunteer opportunities. OCDOA’s main offices are located in both Chapel Hill and Hillsborough, North Carolina, and encompass two senior centers: the Seymour Senior Center, in Chapel Hill, and the Central Orange Senior Center (COSC), in Hillsborough.
Project EngAGE arose from the work of two previous OCDOA Capstone teams. The 2011-2012 OCDOA Capstone team’s 2012-2017 Master Aging Plan (MAP) identified resource and information gaps for older Orange County adults (Goldberg et al., 2012). Using the MAP and additional formative research, the 2012-2013 OCDOA Capstone team specifically recommended, “developing a senior leadership program to train older adults to be resources in their own neighborhoods” (Black, Frank, Kolander, LaMotte & Weinhold, 2013). As such, the current 2013-2014 OCDOA Capstone team’s goal was to create Project EngAGE.

Project EngAGE is a 12-week leadership-training program, whose mission is to engage and enable older adults in Orange County to serve as leaders and resources, and make their community an ideal place to age well. During the 12-week course, senior leaders learn about community resources, resource and resource access gaps, and methods of information dissemination. The course is based at the COSC in Hillsborough, and the group takes field trips throughout Orange County.

By tapping into the growing resource of skilled, experienced, and motivated Orange County older adults, Project EngAGE ultimately seeks to create self-directed Senior Resource Teams (SRTs). SRTs will consist of Project EngAGE graduates, organized in their local communities to help other older adults and their caregivers learn about and access needed local services. SRTs will not only provide a structure for older adult volunteers to contribute their skills and wisdom, but also provide a mechanism for community engagement that has been shown to produce benefits for both volunteers and recipients (Crites, 2011). Project EngAGE’s major goals are described below in Table 1:

<table>
<thead>
<tr>
<th>Table 1: Project EngAGE Goals</th>
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<tr>
<td><strong>Goal 1:</strong> To develop a network of engaged and informed senior leaders to create new supports for the aging community in Orange County.</td>
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<td><strong>Goal 2:</strong> To form self-directed Senior Resource Teams that will act as resources to older adults and their families.</td>
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<td><strong>Goal 3:</strong> To have Senior Resource Teams identify assets, needs, and issues of importance in their communities and advocate for solutions to those issues.</td>
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Guided by formative community research, as well as the overall goals of the MAP (see Appendix C), the Capstone team adapted EngAGED, a successful older adult volunteerism model developed in
Haywood County, NC (Crites, 2011; Goldberg et al., 2012; Walters, 2013). Specifically, Project EngAGE aims to address two major MAP goals: (1) information dissemination, and (2) service gap resolution (Goldberg et al, 2012). To reach these goals, the Capstone team completed five deliverables, as described in Table 2:

Table 2: Major Deliverables

<table>
<thead>
<tr>
<th>Deliverable 1</th>
<th>Project EngAGE Promotional Materials for Community Awareness and Recruitment Efforts</th>
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<tr>
<td>Deliverable 2</td>
<td>Project EngAGE Adapted Curriculum: A Guiding Document for the Implementation of Project EngAGE</td>
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<td>Deliverable 3</td>
<td>Project EngAGE Evaluation Plan and Evaluation Tools</td>
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<td>Deliverable 4</td>
<td>Implementation of Project EngAGE Senior Leadership Program</td>
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<td>Deliverable 5</td>
<td>Evaluation Report Summarizing Results and Recommendations</td>
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The Capstone Team’s logic model, contained in Figure 1, describes the resources, activities, intended outcomes, and impacts of our work. These key inputs and activities encompass our team’s work, which led to our intended results, consisting of our main outputs and impacts. Our logic model illustrates how our initial inputs, such as our team’s efforts, ultimately lead to Project EngAGE’s impact, including increasing quality of life for Orange County older adults.
Background

Aging Around the World and in North Carolina

The world is aging, creating both challenges and opportunities for improving quality of life for older adults (Anderson, Goodman, Holtzman, Posner, & Northridge, 2012). The number of people worldwide aged 60 years and over is projected to increase from 605 million to 2 billion between 2000 and 2050, doubling from about 11% to 22% of the population in the same time period (World Health Organization, 2012). In the United States alone, the proportion of persons aged 65 and older has more than tripled over the past century, from 4.1% in 1911 to 12.9% in 2011 (Anderson, Goodman, Holtzman, Posner, & Northridge, 2012), and by 2040 there will be approximately 80 million older adults, over twice their number in 2000 (Anderson, Goodman, Holtzman, Posner, & Northridge, 2012). As such, the Centers

<table>
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<tr>
<th>Inputs</th>
<th>Activities</th>
<th>Outputs</th>
<th>Outcomes</th>
<th>Impact</th>
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<tr>
<td>Capstone Student Team’s time, effort, experience &amp; expertise</td>
<td>Develop Work Plan</td>
<td>Work plan</td>
<td>One Project EngAGE Senior Resource Team in each target community</td>
<td>Increased local information dissemination and resource gap resolution</td>
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<td>Preceptors, faculty advisors, and teaching team’s mentorship, time, effort &amp; expertise</td>
<td>Engage stakeholders with feedback on consultation protocols</td>
<td>Relationships between stakeholders and Capstone Student Team</td>
<td>Developed and enhanced leadership skills for Project EngAGE graduate leaders</td>
<td>Increased community engagement</td>
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<td>Haywood County’s EngAGED curriculum, Consultants’ time, experience &amp; expertise</td>
<td>Draft and disseminate promotional materials</td>
<td>Promotional materials disseminated</td>
<td>Community projects led by Project EngAGE Senior Resource Teams</td>
<td>Increased quality of life for Orange County older adults, toward the goal of making “Orange County the ideal place to live and age.” (Master Aging Plan, 2012)</td>
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<td>Local knowledge and experience from community stakeholders &amp; Advisory Committee</td>
<td>Recruit participants through snowballing and mini interviews</td>
<td>Finalized participant roster</td>
<td>Process evaluation report informs future improvements to Project EngAGE program</td>
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<tr>
<td>Practicum students’ deliverables</td>
<td>Adapt curriculum</td>
<td>Adapted curriculum</td>
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<td></td>
<td>Plan process and outcome evaluations</td>
<td>Evaluation Plan &amp; Tools created</td>
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<td>Develop evaluation tools</td>
<td>Implementation of Project EngAGE/Project EngAGE curriculum delivered</td>
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<td>Plan logistics for course</td>
<td>Graduation of 10-12 Project EngAGE leaders</td>
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<td></td>
<td>Deliver Project EngAGE curriculum</td>
<td>Process evaluation report</td>
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<td></td>
<td>Facilitate classes</td>
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<td></td>
<td>Conduct process evaluation</td>
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for Disease Control and Prevention (CDC) has called on public health practitioners to address the leading causes of death and to enable high quality of life at every age (Anderson et al, 2012).

North Carolina and Orange County largely reflect national aging trends (see Appendix B. The proportion of North Carolinians aged 65 and older increased by 25.7% from 2000 to 2010, to become 12.9% of the state's total population, and 13.2% of Orange County’s total population in 2011 (Orange County Health Department, 2012; UNC Institute on Aging, 2011). In 2011, 19% of North Carolinians aged 65 and over belonged to ethnic minority groups; 15.7% were African American, 1.2% were Hispanic or Latinos of any race, 0.8% were American Indian or Alaska Native, and 0.9% were Asian (Orange County Health Department, 2012). Between 2010 and 2030, North Carolina's 65 and older population is projected to increase by over 400,000 persons per decade, reaching 2.14 million, or about 18% of the state total (UNC Institute on Aging, 2011). As these demographic trends continue North Carolina and Orange County public health practitioners must be cognizant of the quality of life of their older adults.

Information and Resource Gaps for Older Adults in Orange County

The Master Aging Plan (MAP) identifies information dissemination and service gap resolution as two major goals to increase the quality of life for Orange County older adults. Older adults, particularly those in rural areas, experience challenges accessing essential services and programs – such as healthcare, social activities, and transportation. By addressing the current gaps in services and ensuring that information about current services are disseminated widely, practitioners can help to resolve some of the challenges older adults face and improve quality of life.

Older adults vary in their preferred channel to access resources and information (Black et al., 2013). The OCDOA 2012-2013 Capstone Team concluded that while the Internet was the most popular way to find information, most adults aged 70 years or older do not use the Internet to access information. Though many 55 to 70 year olds do rely on the Internet, its use may be limited among lower socio-economic status, African American, and rural residents (Black et al., 2013). In addition to the Internet,
preferred sources of information for both urban and rural Orange County older adult populations include newspaper, television, radio, and health care providers (Black et al., 2013). Involvement in clubs or voluntary organizations is associated with greater awareness of community services among both urban and rural residents (Black et al., 2013). For Orange County rural populations, however, “word of mouth is the most trusted form of communication about information” (Black et al., 2013).

The MAP identifies eight goals with accompanying objectives, aimed at addressing gaps and increasing quality of life for Orange County older adults (Goldberg et al, 2012). Appendix C outlines the MAP’s goals and objectives, and how Project EngAGE addresses each objective. Additionally, interviews with Orange County residents identified resource gaps that included lack of transportation, limited social opportunities, and healthcare gaps (Walters, 2013). Further, the participants stated that there is limited access to local services, aging-in-place resources, healthy food, and affordable senior housing options. Other less frequently identified resource gaps included emergency preparedness, racial segregation, community and political awareness, legal issues, and finance education (Walters, 2013). These gaps affect all Orange County older adults but are especially salient in rural communities (Walters, 2013). Accordingly, Project EngAGE aspires to address resource gaps and barriers in Orange County in order to make it an ideal place to live and age well.

Addressing Information and Resource Gaps for Older Adults in Orange County

A review of the literature revealed few programs that address the information and resource access needs of older adults; however, the EngAGED program and the model it was based on, Wisdom Works: Building Better Communities, are examples of how older adults can take an active role in closing this gap in their communities through an evidence-supported social network strategy (Southwell, 2013).

Wisdom Works intends “to create self-directed, diverse teams of mature volunteers and, in the process enhance senior volunteer leadership skills” (The National Council on the Aging (NCOA), 2005). These volunteer teams address an identified problem in their community. Many of the eight program
sites, two of which were in North Carolina, generated volunteer projects that addressed the community’s needs and functioning of self-directed volunteer (SDV) teams, both of which were correlated with participant satisfaction (NCOA, 2005).

**EngAGED** is a long-running senior leadership program based on the core principles of *Wisdom Works* provided by Haywood Community Connections in Haywood County, North Carolina (Crites, 2011). Haywood County, like Orange County, faces the challenge of a rapidly aging population and limited resources to serve it (Crites, 2011; Goldberg, Major, Perritt, Prentice-Dunn, & Woodruff, 2012). *EngAGED* includes two key components that reflect the *Wisdom Works* model: 1) a 16-week course in which participants learn about and visit community resources for older adults, including those related to aging at home, mental health, wellness, and long term care, and 2) the creation of Senior Resources Teams (SRTs) that work to identify and meet community needs (Crites, 2011). Over six years and 12 classes, *EngAGED* has produced positive results for Senior Leaders and communities alike (Crites, Gold, & Young, 2013). Participants in the fall 2012 class reported an increased sense of community and social connectedness after the program (Crites, Gold, & Young, 2013). In 2012, SRT members logged 13,002 hours of service valued at $260,040 (Haywood Community Connections, 2012). Team projects have included establishing a community kitchen, hosting a senior emergency preparedness event, disseminating information about senior programming, and beginning a Senior Advocacy Network (Crites, Gold, & Young, 2013). Success of both *Wisdom Works* and *EngAGED* is rooted in a belief that the aging population brings significant value to community programs and the use of self-directed teams.

Many programs that involve older adults as volunteers, such as foster grandparent programs, Experience Corps, *Wisdom Works*, and *EngAGED*, recognize the wisdom, skills, and value these individuals bring to organizations (Evans & Carnegie, 2009; Fried et al., 2004). Indeed, utilizing the talents of enthusiastic and highly skilled Baby Boomer volunteers is one goal of *Wisdom Works* and is a guiding principle of *EngAGED* (Crites, 2011; NCOA, 2005). Considering 60-year-olds may have a third of their lives left to live, engaging volunteer experiences can allow older adults to continue to actively
contribute to their communities and enhance their own well-being (Fried et al., 2004; Hinterlong & Williamson, 2006; Morrow-Howell, 2012). *EngAGED* seeks to capitalize on the assets of seniors by providing an active and intentional learning model that satisfies the principles of adult learning (Knowles, 1996; Thurber, 2003).

Recently, SDV teams have been developed as a way to harness individuals’ knowledge and skills in order to make a difference in their communities. SDV teams are “multi-skilled group[s] of volunteers who share responsibilities for addressing a challenge or opportunity in their community” (SDV Network, 2012). SDV teams are self-led and share responsibility for group decision-making, conflict resolution, project planning and implementation, measuring effectiveness, and developing processes for recognizing accomplishments (Hickman & Creighton-Zollar, 1998; Manz & Sims, 1987; Spreitzer, Cohen, & Ledford, 1994; NCOA, 2005). *WisdomWorks* and *EngAGED* use SRT as SDV teams. The SRTs are a way to organize community volunteers into groups that can determine the needs of the community based on their knowledge, expertise, and skills.

Group dynamics play a major role in SDV teams’ effectiveness (Hickman & Creighton-Zollar, 1998). Some factors that affect their productivity include workload division, diversity, level of communication, open-mindedness, and level of contribution to the team (Hickman & Creighton-Zollar, 1998). It has also been shown that groups are more successful when they have clear direction, strong leadership, well-articulated team-oriented tasks, and support from their agency (Levi & Slem, 1995). Both *Wisdom Works* and *EngAGED* train and support SDV teams to promote strong group cohesion and team effectiveness. Project EngAGE draws on the aforementioned methods to meet the needs of older adults in Orange County. Through recruiting a diverse cohort of skilled leaders, Project EngAGE values the talents of this community. Comparably, the curriculum focuses on relationship building between participants, and with local leaders, visits to local organizations and agencies, and learning from relevant guest speakers. Upon graduation, Project EngAGE senior leaders form SDV senior resource teams and to return
to their communities, equipped and motivated to share information about community resources and to fill resource gaps with their own unique projects.

**Methods**

**Formative Work & Orientation**

OCDOA has a long-standing relationship with the UNC Health Behavior department, having hosted two prior Capstone teams whose work led to the decision to implement Project EngAGE. Prior to our involvement, OCDOA purchased Haywood County’s *EngAGED* toolkit and access to consultations with the program’s creators. Two Capstone team members, Kellie Walters and Yvette Garcia Missri, worked at OCDOA as practicum students in summer 2013, allowing them to learn about the organization and population. As formative research for Project EngAGE, Kellie conducted 19 qualitative interviews with older adults in Orange County. Through this work she identified community needs and assets, recruitment strategies, potential participants, and recommendations for the program. During this time, the Project EngAGE Advisory Committee, a subset of the Aging Advisory Board, was created to provide guidance and stakeholder input during the first year of the program.

Several activities were planned to introduce the Capstone team to OCDOA, Orange County, and Project EngAGE. Preceptors took three of the Capstone team members on a tour of the county and the senior centers. Furthermore, Capstone team members took part in an orientation to Project EngAGE, facilitated by Kellie, which included a Skype videoconference with the three *EngAGED* consultants in Haywood County. All Capstone team members reviewed prior Capstone deliverables, including the MAP, formative work, the Project EngAGE Recruitment Strategy & Program Recommendations documents, and the *EngAGED* toolkit. Finally, to prepare for the planning and implementation of Project EngAGE, the three *EngAGED* consultants from Haywood County planned and facilitated a four-hour facilitation training for the Capstone team and OCDOA staff. We utilized all of this work to inform the planning and implementation of Project EngAGE.
Overview of Capstone Project Work

This Capstone project included two overarching sub-projects: (1) developing Project EngAGE and (2) implementing the first iteration of Project EngAGE. To develop this program, we identified long-term goals, adapted the EngAGED curriculum, and created an evaluation plan and tools. To implement Project EngAGE, we promoted the program, recruited participants, created a budget, planned and coordinated program sessions, facilitated program sessions, and evaluated the program. Throughout this entire process, stakeholders were heavily involved. Stakeholders and consultants included: OCDOA preceptors, OCDOA staff, area aging experts, the Project EngAGE Advisory Committee, Project EngAGE participants, and EngAGED consultants. We turned to our stakeholders to solicit ideas, troubleshoot challenges, make key program decisions, gather feedback, and plan for the future and sustainability of Project EngAGE.

Developing Project EngAGE

We began the planning and adaptation process by developing the mission and long-term goals of Project EngAGE. We utilized prior student work at OCDOA to understand the needs, assets, and goals of the community. Additionally, we reviewed and considered Haywood’s EngAGED core components, which include seniors as resource leaders, an adventurous and non-traditional training, and the use of SDV teams. Using this information, we presented ideas to the Advisory Committee, who provided their opinions on the overall mission and goals of Project EngAGE. After multiple meetings and discussions, we reached consensus on a mission statement and the long-term goals described in Table 1. Guided by our overall mission and best practices largely developed through our core MPH course, "Planning Public Health Interventions," we developed a list of five short-term objectives (see Table 3) that would be used for outcome evaluation.

Table 3: Project EngAGE Preliminary Outcome Objectives

<p>| Objective 1: To advance senior leaders’ understanding of the local human service network for older adults: | Increase the number of known community resources by 25% upon completion of Project EngAGE as verified through self-assessment pretest and posttest data. |</p>
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<tr>
<th>Objective 2: Increase senior leaders’ self efficacy for engaging their community: Increase the scores on participant self-assessment of comfort engaging their community by 25% upon completion of Project EngAGE as verified through self-assessment pretest and posttest data.</th>
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<tr>
<td>Objective 3: To increase senior leader intent to participate in the newly formed self-directed teams in their own community upon graduation: 80% of the seniors in Project EngAGE will intend to participate in self-directed teams upon graduation as verified through posttest data.</td>
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<td>Objective 4: To train local senior leaders to serve as information resources in their communities: a) 80% of the seniors in Project EngAGE will complete Project EngAGE as verified through attendance records. b) 80% of the seniors in Project EngAGE will be able to introduce, explain and recommend community resources upon completion of Project EngAGE as verified through a variety of learning activities during class session 12.</td>
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<tr>
<td>Objective 5: To develop a sense of community and lasting bonds amongst senior leaders: Increase rapport among the senior leaders as Project EngAGE progresses, as verified through weekly observations by the Capstone Team (in Facilitator Reflection document).</td>
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In tandem with the development of goals and objectives, we began to adapt the *EngAGED* program by reducing the number of sessions and selecting topics to meet the needs of Orange County. To achieve this, we considered the MAP priorities and recommendations from formative research, and reviewed Haywood County’s topics. We created and refined a topic list, presented it to the Advisory Committee for feedback, and identified the topics for our 12 sessions. We ordered the sessions so that the program began with more substantive content topics to build a foundation and ended with skill development and community engagement topics. Then, we created a name, description, and preliminary resource list for each of the 12 sessions. These outlines guided the development of the lesson plans, which were created in two waves, with sessions one through seven created first, and sessions eight through twelve created next. Given our limited aging expertise and knowledge of Orange County resources, we collaborated with OCDOA staff members and area aging experts to develop session activities, agendas, and learning objectives and to identify speakers and site visits. This proved an iterative process, as sessions changed throughout planning and implementation.

Next, we developed the process and short-term outcome evaluation plan, including SMART (Specific, Measurable, Attainable, Relevant, and Time-Bound) objectives, a logic model of the program, and a process for collecting and analyzing data. The evaluation plan included multiple tools to measure our process and short-term outcome objectives. The recruitment log was utilized to document potential
participants, including their demographic information, personal history, concerns about their community, and interest in Project EngAGE. The adaptation log documented the changes from the *EngAGED* curriculum to the new Project EngAGE curriculum. For each session, the facilitation observation tool, facilitator reflection guide, participant satisfaction activity, and the attendance log were developed to acquire the participant satisfaction & knowledge, facilitator feedback, and attendance in order to gain a better understanding of what went well in each session and areas for improvement for future iterations of the program. Finally, the pre and post-course questionnaire, stakeholder satisfaction discussion guide, and course completion log were tools to measure changes of participant knowledge over the program, the satisfaction of our stakeholders with our program, and the participants’ completion of the program. These tools were used to evaluate the extent to which the pilot program of Project EngAGE achieved its goals and objectives. We used best practices from our Program Planning and Intervention courses, guidance from faculty advisors, and feedback from older adults and *EngAGED* consultants to develop the evaluation plan and tools.

**Implementing Project EngAGE**

We began the implementation process by promoting Project EngAGE to build recognition of the program and recruit participants. Using the Project EngAGE Recruitment Strategy & Program Recommendations document created over summer 2013, we created a “talking points” document to encourage consistent messaging. Primary communications channels included press releases, *Senior Times* articles, fliers placed throughout the county, and word of mouth.

The Advisory Committee and preceptors’ primary goal for recruitment was to find potential participants who were not usually involved with OCDOA efforts. As such, we consulted the Advisory Committee to identify priority communities and to gain recommendations for recruitment. The consensus was that Project EngAGE’s inaugural class should focus on rural areas, but that participant fit superseded the need to meet geographic quotas. By using the Committee’s recommendations, we recruited most participants through a snowballing strategy, which began in summer 2013 and continued into the fall.
Additionally, some participants self-selected after hearing about the program. We interviewed interested participants in order to learn about them, explain Project EngAGE, and determine fit. To be selected, participants had to be residents of Orange County, aged 55 and older, be respected and trusted in their community, have a willingness to help their community, have good communication skills, and express passion for the goals and activities of Project Engage. We presented a list of potential participants to the Advisory Committee for approval, and the preceptors assisted us in approving final participants. The final fifteen participants received a formal invitation and preliminary details about the class.

While lesson plans were created, we concurrently began to plan the day-to-day tasks and responsibilities associated with managing a 12-week, 15 participant program. We developed a program budget, which required consultation with EngAGED consultants, collaboration with preceptors, and forward thinking to determine necessary supplies for future sessions and graduation. We secured a primary location for the course, assigned roles (i.e., facilitators, co-facilitators), and ordered and prepared course materials.

Each member of the Capstone team served as the facilitator for two or more sessions, as well as a co-facilitator for two or more sessions. As facilitators, we developed the session lesson plan with OCDOA staff and coordinated logistics for the five-hour session. We contacted and booked guest speakers who could present expert views on relevant topics and organized site visits so that participants could see Orange County resources first hand. In many cases, this required us to build new relationships and promote Project EngAGE. We planned discussion and community building activities using our facilitation training as guidance. Finally, we created handouts, including a standardized “session handout” for each session that included an overview of the session, a detailed agenda, speaker information, and session-related resources. Additional handouts supplemented the curriculum and were created in collaboration with OCDOA staff and content-area experts.

Facilitators were responsible for coordinating and leading their sessions. Each week, prior to the class, we emailed participants with the session’s details, including the agendas, lunch menu, and transportation logistics. On the day of each session, we prepared the conference room with nametags,
participant binders, flip charts, and other materials; facilitated discussions; introduced speakers; and collected evaluation data. For evaluation purposes, we led a discussion to gather qualitative satisfaction data including information or experiences that pleased them, concerned them, or surprised them. This information was used to adjust the current program and will be used to improve future iterations. Following each session, we completed multiple evaluation tools including: the facilitation observation tool, facilitator reflection guide, participant satisfaction activity, and the attendance log. A protocols document was developed to outline these tasks and encourage consistency among facilitators. OCDOA staff, especially the preceptors, played an active role in logistics planning and troubleshooting. Our preceptors attended all of the program sessions for support and program sustainability purposes.

The Capstone team used both qualitative and quantitative methods in their analysis for the evaluation report. These tools were completed by the Capstone team, Project EngAGE participants, Advisory Committee, preceptors, and OCDOA staff. For the quantitative sections, including the attendance proportions and certain questions from the pre-post participant survey, evaluators calculated the proportions using Excel. For the qualitative analysis, which included the participant satisfaction activity, participant interviews, advisory committee discussion, and facilitator feedback, the evaluators developed an iterative process to identifying key themes. Due to time constraints, the data was analyzed continually throughout the spring and new emerging themes were integrated into the analysis. All of the data was compiled and analyzed into the evaluation report at the completion of the Project EngAGE course. Based on the analysis and discussion, the Capstone team developed a series of recommendations for the program and for future facilitators of Project EngAGE.

Results

Results from the Development of Project EngAGE

All process objectives, including fidelity, reach, satisfaction, and feasibility were achieved. Fidelity, or the measurement of modifications between the original EngAGED curriculum and the Project
EngAGE curriculum, was measured throughout the development of the program. When the Capstone team created the curriculum overview, we decided to keep two of the key components of EngAGED, described below in Table 4. The non-traditional training component was the guiding principle for the structure of our course. We integrated non-traditional training into each session, from field trips to community resources such as the Orange County Health Department, Carol Woods, and the PACE facility in Burlington. Although originally unplanned, we also added tours to each of the participants’ neighborhoods, which allowed them to learn about the county from each others’ perspective. The use of the self-directed teams component framed the post-graduation plans for Project EngAGE and guided the development of the program. Following these components throughout our adaptation assisted in achieving our fidelity and participant satisfaction goals in our process evaluation. In our outcome evaluation, the adaptation based on these components supported the development of SRTs and growth in the sense of community among participants.

Table 4: Key Components of EngAGED that were utilized in Project EngAGE

| 1. Adventurous and non-traditional training through field trip based learning experiences |
| 2. The use of self-directed teams |

The curriculum, adapted from EngAGED, was shortened from a 15-lesson course to a 12-lesson course. The majority of sessions from EngAGED were maintained or combined, although their titles and objectives were adjusted to fit the needs of our participants. The 12 topics that were covered in the course were: Introduction to Project EngAGE, Wellness and the Body, Wellness and the Mind, Aging in the Community, Healthcare, Long-Term Care, Preparing for Emergencies, Dementia and Caregivers, Understanding the System, Community Engagement, Skills Lab, and Preparation for Graduation. These results, as well as the information on fidelity in Table 5 (see page 22), summarize the fidelity process objective that was achieved during the development of Project EngAGE.
Results from the Implementation of Project EngAGE

The majority of process and outcome objectives were measured during the implementation of Project EngAGE. To summarize the results from the reach objective, we exceeded our goal of recruiting 10-12 diverse individuals from rural, low-resource priority areas with the initial class of 15 senior leaders. Furthermore, all of these individuals met our participant selection criteria as established by the Project EngAGE Advisory Committee. Figure 2 is a map that represents the distribution of participants throughout Orange County and is a visual representation of achieving our reach objective.

Figure 2: Map of Participants Locations in Orange County

The participants, facilitators, and stakeholders were all extremely satisfied with the first iteration of Project EngAGE. Furthermore, each of these groups provided structural and logistical recommendations to improve upon in future iterations of the programs. The feasibility objective showed that future implementers of Project EngAGE will need a diverse skill set, including facilitation skills, project management, evaluation planning and analysis, amongst others. The implementers will need
roughly 15-20 hours per week to plan and implement Project EngAGE. The summary of the process evaluation findings is shown in Table 5.

**Table 5: Summary of Process Evaluation Objectives & Findings**

<table>
<thead>
<tr>
<th>Objective</th>
<th>Summary of Findings</th>
<th>Objective Met</th>
</tr>
</thead>
</table>
| Fidelity: To track and report the adaptation modifications made from Haywood County Connections model and actual delivery of the Project EngAGE curriculum | • Project EngAGE was adapted from 15 class sessions to 12 class sessions.  
• The majority of topics from EngAGED were incorporated into the Project EngAGE lessons, with the removal of the Lifelong Learning and the Environmental Sustainability class. Based on research of preferences in Orange County, the Capstone team added classes on Healthcare, Preparing for Personal Emergencies, and Dementia & Caregivers. | X             |
| Reach: To assess the extent to which Project EngAGE successfully involves people who are in the priority group(s) for this intervention, or who have connections to those priority groups (e.g., older adults with low resource and information access in rural Orange County) | • We had 12 female participants and three male participants, ranging in age from the late 50s to mid 70s.  
• The participants came from a variety of rural townships, including three participants from Bingham, four participants from Little River, four participants from Chapel Hill, and one participant from each of the following communities: Cedar Grove, Mebane, Eno, and rural Chapel Hill township. | X             |
| Satisfaction: To assess participant and stakeholder satisfaction with Project EngAGE | • Participants were very satisfied with the program and suggested changes in certain speakers and logistics of sessions to improve the type of information shared and to improve the flow of future iterations of the course.  
• Facilitators were satisfied with the course implementation overall and provided concrete suggestions for aspects of each class that did not work well for adaptation in the future.  
• Advisory Committee members and OCDOA staff were extremely satisfied with the program and suggested structural and logistical improvements for future iterations of the program. | X             |
| Feasibility: To assess the physical and human resources necessary to plan and implement Project EngAGE | • Communication, facilitation, interviewing, promotion, recruitment, budget writing, lesson planning, event-planning, evaluation planning, and data collection & analysis skills were needed to plan and implement Project EngAGE.  
• Capstone team members spent 15 to 20 hours preparing and planning each lesson, which included contacting potential speakers and field trip locations, planning logistics, and implementing the class sessions. | X             |
Project EngAGE met two and a half, out of the five outcome objectives. 100% of participants completed the course, achieving half of the objective to train senior leaders to serve as information resources in their communities. Additionally, 100% of Project EngAGE participants intend to work in their SRTs after graduation. The program also successfully increased the sense of community and created lasting bonds among participants. However, the goals of advancing senior leaders understanding of the local service network, and of improving their self-efficacy for community engagement, were not met. Significantly, for the understanding of the local service network objective, the Capstone team recognizes that the knowledge evaluation tools focused on senior leaders knowledge of specific information, rather than on measuring overall ability to find the resources. Further, for the self-efficacy outcome objective, participants’ high measure of self-efficacy measured before the program made it difficult to identify noticeable differences after the program. Changes to the evaluation tools could potentially more accurately measure these objectives. Table 6 summarizes the outcome evaluations objectives and findings.

Table 6: Summary of Outcome Evaluation Objectives & Findings

<table>
<thead>
<tr>
<th>Objective</th>
<th>Summary of Findings</th>
<th>Objective Met</th>
</tr>
</thead>
</table>
| To advance senior leaders’ understanding of the local human service network for older adults | ● Participants shifted from recommending outside resources before the program to discussing OCDOA and internal resources after the completion of the course.  
● On average, participants listed 2.5 community resources both before and after the program. |               |
| To increase senior leaders’ self efficacy for engaging their community    | ● There was a 7.5% increase in self-efficacy from pre-course to post-course.                                     |               |
| To increase senior leader intent to participate in the newly formed self-directed teams in their own community upon graduation | ● 100% of participants have plans to participate in Senior Resource Teams after graduation.  
● Three Senior Resource Teams have been developed: Northern Orange, Southern Orange, and Chapel Hill. | X             |
| To train local senior leaders to serve as information resources in their | ● 100% of participants completed the Project EngAGE course as verified through attendance records.  
● On average, 89.4% of participants attended each session.                          | Partially Met |
communities

**To develop a sense of community and lasting bonds amongst senior leaders**

- The explanation of community resources objective was not met.
- The sense of the community amongst the senior leaders has grown over the course by taking interest in learning more about their fellow leaders, talking and brainstorming ideas for their Senior Resource Teams, their plans to meet monthly after the course is completed, and their willingness to support each other.

X

### Discussion

Our Capstone project has the potential to have a long-term impact on OCDOA and the people it serves. This first year of planning and implementing Project EngAGE laid the foundation for future iterations of the program. Already, the first cohort of Project EngAGE graduates are poised to act as resource leaders in their communities and conduct community projects in SRTs. The connections with community leaders and speakers established in this iteration of Project EngAGE will be important for future sessions, and will help to widen the networks of both Project EngAGE participants and OCDOA. OCDOA can consider the senior leaders and subsequent Project EngAGE graduates as an extension of their network in the county. Each senior leader has a multitude of connections, skills, and wisdom. This mechanism of continually generating “human capital” has the potential to transform how OCDOA will gather information about the needs of Orange County citizens, design programs, and disseminate information to intended recipients of -- or participants in -- its programs. For instance, OCDOA will be able to spread the word of any new initiative to rural Orange County communities by engaging the senior leaders to hold information sessions. Sustaining the participant network and implementation of Project EngAGE also has implications for how OCDOA operates in the future. Specifically, by taking this first step to adapt and implement Project EngAGE in Orange County, OCDOA has committed itself to providing the support and resources necessary to facilitate the SRTs’ efforts, to implement Project EngAGE in future years, and to continually evaluate and improve upon the program with each iteration.

More broadly, the planning and implementation of Project EngAGE in Orange County has implications for older adult development, leadership, and volunteerism programs in other settings. Although the results of the current short-term outcome evaluation are preliminary, they suggest that the
core components of a successful senior leadership program (as outlined in the results section) may be responsible for the outcomes. Going forward, longer-term outcome evaluation of Project EngAGE – measuring the number and quality of projects completed by senior leaders, changes in rural older adults’ access to county services, and changes in rural older adults’ quality of life overall – may reveal positive effects on older adult volunteerism, sense of community belonging, connections to services, and improved quality of life. If so, other older adult communities across the US should implement programs based on these core components and test their generalizability to new settings and populations through rigorous evaluation research.

This Capstone project had some limitations centered mainly on time constraints. The Capstone team feels that the planning and execution of Project EngAGE would have benefitted from more investment of time at nearly every stage, even though the team and other stakeholders had little capacity to give more time. Had the Capstone team had more time to collaborate with the Advisory Committee, the Committee could have taken a more active role in directing Project EngAGE, thereby better reflecting the interests of the stakeholders. Increasing the number of contact hours in the curriculum -- or maintaining it at 80 contact hours like Haywood’s EngAGED program, instead of reducing it to 60 hours -- could have increased the quality of the program, allowing participants to experience topics more deeply and have more time for discussion and reflection.

Another limitation dealt with the evaluation design, which limited our ability to quantitatively assess three of Project EngAGE’s outcome objectives. If the team had not chosen to focus on content-level knowledge as an outcome objective from the course, and instead assessed participants’ ability to locate resources relevant to Orange County older adults, the evaluation would have more closely reflected the goals of Project EngAGE. Overall, although Project EngAGE did not meet quantitative targets in three short-term outcome objectives, qualitative findings related to those objectives and the fulfilment of two other outcome objectives and all process objectives suggest that Project EngAGE was an overall success in its first iteration.
The Capstone team has several recommendations for Project EngAGE’s next steps. With a newly graduated cohort of Project EngAGE senior resource leaders, OCDOA staff and future implementers should create a sustainability plan to support them as individuals and SRTs on an ongoing basis. The OCDOA staff already plans to host monthly meetings with the graduates to keep them connected to each other and to OCDOA for advice and assistance in implementing community projects. These graduates should also have access to assistance from OCDOA and their peers through real-time communication networks, such as Internet forums and dedicated support personnel, where possible. Program graduates interested in taking a leadership role in Project EngAGE should be encouraged to join the Advisory Committee. Not only should Project EngAGE graduates have accessible support, but OCDOA and/or future Project EngAGE evaluators should create and implement a plan for tracking SRT activities. These data will facilitate a long-term outcome evaluation of Project EngAGE. Future evaluators should build upon the first year evaluation plan to design continued process and outcome evaluations of the program.

To prepare for the next iteration of Project EngAGE, OCDOA staff and/or implementers should begin recruiting the next class of participants by three months before sessions begin. Finally, program implementers should publicize Project EngAGE and the activities of its graduates in local news outlets (e.g., Senior Times, News of Orange, Chapel Hill News) in order to build community awareness and support of the program. Each of these steps would help to solidify the gains from the first year of Project EngAGE and prepare for its continuation into the second year.

In the longer term, the Capstone team recommends the consideration of several steps to ensure the sustainability of Project EngAGE in Orange County. The most immediate consideration is, as mentioned, continued support for the SRTs who have graduated from Project EngAGE and will continue to work in their communities as resource and project leaders. This support would ideally be provided by OCDOA, a stable organization with thorough knowledge of Project EngAGE’s mission and goals. The program would benefit from full-time staffing with the proper skills and resources to carry out continued support for SRTs, the Project EngAGE annual training program, and longer-term outcome evaluation. The Advisory Committee, or a similar advisory board, should be institutionalized to ensure that
community and participant stakeholders continue to guide the implementation and adaptation of Project EngAGE to address changing future circumstances and needs. Fundamentally, OCDOA should apply for grants and/or state funds to provide a steady, long-term funding source to ensure Project EngAGE’s long-term sustainability and facilitate the aforementioned steps.

The impact of Project EngAGE extends not only to its stakeholders, Orange County residents, and similar programs for older adults, but also to the Capstone team members’ professional development. The experience of planning, implementing, and evaluating Project EngAGE as a student team has given us the opportunity to learn about new areas of public health, acquire new skills, develop confidence in our abilities, and gain wisdom from one another, stakeholders, and participants. Project EngAGE has been a formative experience, and as a result, some of us have decided to pursue further public health work related to aging. Although we each brought many skills to the Capstone project, we all have come away with a full “toolbox,” including recruitment, training, curriculum adaptation, facilitation, program management, evaluation, and community engagement skills. We acquired some of these skills through external training and self-education, but many we learned from one another. Through our collaboration as a student team, we not only exchanged ideas and developed one another’s skills, but we also learned together how to build and maintain a positive, productive, supportive, and highly functional team. Finally, the Capstone team has learned from the wisdom of our preceptors, advisors, community stakeholders, and program participants, who have all shown us the immense diversity of experience, knowledge, skills, and perspectives that older adults can contribute to their communities, and to the world.

**Conclusion**

Project EngAGE has been an overwhelming success, measured not only by its exceptional inaugural class of 15 graduate Senior Leaders, but also by establishing a new and innovative model for Orange County older adults to utilize their skills, experiences, and interests to meaningfully improve their communities. While our team faced some challenges, especially around time-constraints, Project EngAGE has largely met its overarching goal and mission, measured through participant and stakeholder
feedback. Moreover, as a result of our strong partnership with OCDOA, our Capstone team was able to create a program, built both to endure time and to adapt to changing resources. As a team, and individually, we are excited to watch Project EngAGE continue to adapt to the growing and changing older adult population, and to stay connected to this outstanding program.
# Appendices

## Appendix A: Deliverable Tables

<table>
<thead>
<tr>
<th>Deliverable I: Promotional Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Format:</strong></td>
</tr>
<tr>
<td>• 1 page, “Talking Points” word document</td>
</tr>
<tr>
<td>• 1 page information sheet</td>
</tr>
<tr>
<td>• Two 150 – 250 word pieces for Senior Times newspaper in Winter, Spring, &amp; Summer editions</td>
</tr>
<tr>
<td>• Two 200 - 300 word press releases</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Purpose:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>To build awareness of Project EngAGE in the Orange County community and recruit participants</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Intended Audience(s):</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary: Retirees representing various local communities within Orange County</td>
</tr>
<tr>
<td>Secondary: Greater Orange County</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Activities:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Drafted Internal Talking Points document with key details about Project EngAGE to encourage consistency across communications</td>
</tr>
<tr>
<td>• Revised existing Project EngAGE information sheet, previously vetted by members of the Aging Advisory Board</td>
</tr>
<tr>
<td>• Wrote article for Winter <em>Senior Times</em> to promote Project EngAGE</td>
</tr>
<tr>
<td>• Wrote press release to recruit for Project EngAGE</td>
</tr>
<tr>
<td>• Wrote article for Spring <em>Senior Times</em> about the start of the class and participants</td>
</tr>
<tr>
<td>• Wrote press release about Project EngAGE graduation</td>
</tr>
<tr>
<td>• Wrote article for Summer Senior Times about the success of the first class and to start recruitment for the next class</td>
</tr>
<tr>
<td>• All <em>Senior Times</em> articles and press releases were reviewed by and submitted by OCDOA staff</td>
</tr>
<tr>
<td>• Archived all materials in a Dropbox folder, shared with the preceptors, for future use by OCDOA and Project EngAGE facilitators</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Recommendations:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Future Project EngAGE implementers should:</td>
</tr>
<tr>
<td>• Develop an overall purpose (e.g. promote Project EngAGE, recruit participants) for the communications plan. This will guide the channels and messages used.</td>
</tr>
<tr>
<td>• Continue utilizing best practices for communication and design for older adults (e.g. greater font size, contrast, white space) when creating publications.</td>
</tr>
<tr>
<td>• Strongly encourage the Aging Advisory Board, Project EngAGE Advisory Committee, and/or OCDOA staff to provide feedback on promotional materials.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Deliverable II: Adapted Curriculum</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Format:</strong></td>
</tr>
<tr>
<td>• 69 page word document</td>
</tr>
</tbody>
</table>
**Purpose:**
To produce a guiding document for the implementation of Project EngAGE.

**Intended Audience(s):**
The Capstone team and other Senior Leadership Class facilitators

**Activities:**
- Reviewed Haywood Community Connection’s EngAGED toolkit and Master Aging Plan (MAP) needs assessment
- Created list of goals, objectives, and draft topics for Project EngAGE
- Submitted goals, objectives and draft topics to mentors and Advisory Committee for feedback
- Incorporated feedback to finalize goals and objectives
- Selected 12 overarching topics to cover (1 per each class), as well as additional graduation agenda ("class 13")
- Scheduled the order of topics
- Created an outline for the overall curriculum with a brief description of the purpose of each class and possible community resources related to each class
- Submitted outline to mentors for feedback
- Incorporated feedback to finalize overall curriculum
- Drafted adapted curriculum for first half of the curriculum (classes 1-7)
- Submitted to mentors and other identified project stakeholders for feedback
- Incorporated mentor feedback to finalize first half of the curriculum
- Drafted adapted curriculum for second half of the curriculum (classes 8-12) and the graduation agenda
- Submitted to mentors and other identified project stakeholders for feedback
- Incorporated mentor feedback to finalize second half of the curriculum
- Archived all materials in a shared folder for future use by OCDOA and Project EngAGE facilitators

**Recommendations:**
Future Project EngAGE implementers should:
- Use participant feedback in future curriculum planning in order to continuously improve the quality and relevance of course material.
- Create lessons plan agendas well in advance of sessions, as they are extremely time consuming to plan when accounting for speakers schedules, availability of site visit locations, and possibly competing visions between stakeholders.
- Schedule ample time for group activities, discussion, and reflection. Participants appreciate having time to discuss their ideas/topics in depth.

---

**Deliverable III: Evaluation Plan and Evaluation Tools**

**Format:**
- **Plan:** 7 page word document
- **Tools:** 9 word documents (1-3 pages each) and 3 excel
### Purpose:
1. To specify how the fidelity, feasibility, reach, and satisfaction of recruiting and training Senior Leadership Class participants will be evaluated.
2. To establish outcome measures that OCDOA staff and stakeholders will use in the future.

### Intended Audience(s):
The Capstone team, OCDOA staff, and other Senior Leadership Class facilitators.

### Activities:
- Created an outline of the Evaluation Plan.
- Wrote Evaluation Plan document.
- Created 8 qualitative Evaluation Tools, including the following: Advisory Committee meeting reflection tool, Advisory Committee satisfaction discussion guide, Curriculum Adaptation Log, Facilitator Observation Tools, Group Satisfaction Activity tool, Skills Log, and OCDOA Staff Satisfaction discussion guide.
- Created 4 quantitative tools (with some open-ended response frames), including the following: Graduation Log, Pre-Training Participant Questionnaire, Post-Training Participant Questionnaire, Recruitment Log.
- Archived all materials in a shared folder for future use by OCDOA and Project EngAGE facilitators.

### Recommendations:
- Future Project EngAGE implementers and evaluators who plan to conduct a process evaluation of Project EngAGE should modify the tools and evaluation plan to adapt to:
  - Changes made to the curriculum or program implementation.
  - Recommendations from the final Evaluation Report.

---

### Deliverable IV: Implementation

#### Format:
- Delivery of 12, five-hour weekly Project EngAGE sessions.
- Graduation event agenda.
- Program budget.
- Program participant recruitment.
- Course materials.
- Securing of program logistics.
- Process evaluation data collection.

#### Purpose:
To empower and enable Orange County older adults to become community resource leaders by developing and enhancing their leadership skills and resource knowledge base.

#### Intended Audience(s):
Orange County older adult Senior Leader class members.

#### Activities:
- Created and utilized Project EngAGE Program budget.
- Recruited, through snow-balling and promotional efforts, as well as participant self-selection, interviews, approval from the Advisory Committee, and special invitation, 15
Orange County, NC, older adult leaders for the inaugural Project EngAGE class, in consultation with OCDOA, and the Project EngAGE Advisory Committee

- Secured Project EngAGE program logistics for each session, including site visit locations, key personnel, program schedules, meeting space, guest speakers, and participant transportation
- Created course materials for each session, including session information, agendas, list of resources and speaker information
- Created written Project EngAGE session protocols
- Created graduation event agenda in consultation with preceptors and Advisory Committee
- Delivered 12, five-hour weekly sessions that included relevant speakers, site visits and student team presentations, reflected and archived in lesson plans and course materials
- Collected process evaluation data and analyzed results, summarized in Evaluation Report (Deliverable 5)

**Recommendations:**

**Recruitment-related recommendations for future Project EngAGE implementers/recruiters:**

- Identify potential participants through snowballing efforts, beginning with previous graduates as sources for new potential participants (e.g., each current participant replaces her/himself with a new participant).
- Invest time in the interview process with participants. This helps ensure we know a lot about them and that they know what they are getting into.
- For consistency and order, the interviewers should use the same talking points document and interview guide. Prospective participant information should be recorded in Excel.
- The Advisory Committee or other overseeing entity should be responsible for selecting participants, especially as participation becomes more selective. Participants should receive formal invitations for the program. Both of these items will increase the prestige of Project EngAGE.

**Implementation-related recommendations for future Project EngAGE implementers:**

- When possible, before selecting speakers, interview them about the content of their lectures/discussions to assess fit and to avoid negative surprises.
- Before first session, survey participants about any dietary restrictions, need for special accommodations, and general information about their comfort.
- Will add more recommendations as sessions progress

**Deliverable V: Evaluation Report**

**Format:**

- 40 page word document
<table>
<thead>
<tr>
<th><strong>Purpose:</strong></th>
<th>To summarize the results of implementing the Project EngAGE curriculum and recommend improvements in design and implementation for future course offerings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Intended Audience(s):</strong></td>
<td>Department on Aging staff, Advisory Committee, community stakeholders, future implementers and evaluators</td>
</tr>
</tbody>
</table>
| **Activities:** | - Created an outline for the evaluation report  
  - Developed a dissemination plan  
  - Analyzed evaluation data every four class sessions, compiling data summaries  
  - Wrote the evaluation report  
  - Incorporated feedback from preceptors and faculty advisors  
  - Disseminated findings to Advisory Committee and Department on Aging staff |
| **Recommendations:** | Future Project EngAGE implementers and evaluators should:  
  - Lengthen debriefing and reflection time at the end of each class session to allow time for written and verbal evaluation tools.  
  - Adapt knowledge points evaluation tool to a short, written response from participants at the end of each session that asks about one insight from the session and how they can use the insight in their community.  
  - Shift knowledge evaluation tools away from measuring actual knowledge, toward measuring the general ability to navigate Orange County resources.  
  - Continue current evaluation practices for the second iteration of Project EngAGE program.  
  - Complete an outcome evaluation to determine the long-term impact of Project EngAGE on older adults in Orange County. |
Appendix B: North Carolina Older Adult Projections

Table 1 shows the 2011 proportions of older adults in North Carolina, as well as some 2031 projection (North Carolina Division of Aging and Adult Services, 2012).

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2011 Population Proportion</th>
<th>2013 Population Proportion (projected)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baby Boomers (47-65 years)</td>
<td>24.6%</td>
<td>N/A</td>
</tr>
<tr>
<td>60 years and older</td>
<td>19.1%</td>
<td>N/A</td>
</tr>
<tr>
<td>65 and over</td>
<td>13.3%</td>
<td>19.6%</td>
</tr>
<tr>
<td>85 and over</td>
<td>1.6%</td>
<td>2.3%</td>
</tr>
</tbody>
</table>

Table 2 depicts 2011 and 2025 projected growth for Orange County (UNC Institute on Aging, 2010). Significantly, in 2011, Orange County 0-17 year olds outnumbered the 60 and over age group. But, in 2025, the 60 and over age group will surpass 0-17 year olds.

<table>
<thead>
<tr>
<th>Year</th>
<th>0-17 Age Group</th>
<th>60+ Age Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>27,975</td>
<td>20,954</td>
</tr>
<tr>
<td>2025 (projected)</td>
<td>28,796</td>
<td>36,316</td>
</tr>
</tbody>
</table>
## Appendix C: Project EngAGE, MAP Goals, Objectives

<table>
<thead>
<tr>
<th>MAP Goal</th>
<th>Goal Objectives</th>
<th>Addressed by PE?</th>
<th>How Addressed by PE</th>
</tr>
</thead>
</table>
| **Goal 1:** Empower older adults, their families, and other consumers to make informed decisions and to easily access available services and supports. | Objective 1.1: Increase the accessibility of information about resources, programs, and services for older adults in Orange County.  
Objective 1.2: Provide general information related to finances, long-term care insurance, and estate planning to older adults within Orange County.  
Objective 1.3: Ensure the attention to diversity in Department on Aging programs and information sharing efforts. | X                | PE addresses all three objectives though its implementation. PE’s overarching goal is to fulfill the first objective, and will fulfill the second objective through its course content. Further, PE aims for diversity in its program content and participant roster. |
| **Goal 2:** Enable older adults to age in their place of choice with appropriate services and supports. | Objective 2.1: Orange County, with input from the towns of Chapel Hill, Carrboro, and Hillsborough, will develop and adopt a housing plan for Orange County’s increasing older adult population that includes action steps and a plan for implementation and evaluation.  
Objective 2.2: Preserve and increase the number of affordable housing options for low and middle income older adults.  
Objective 2.3: Increase the proportion of the housing stock that accommodates the needs of older adults through universal design features.  
Objective 2.4: Coordinate the navigation and transportation plans between the various counties, towns, and other regional bodies that enable community mobility for older adults.  
Objective 2.5: Orange County will encourage transportation services that enable community mobility for older adults.  
Objective 2.6: Protect and increase the provision of meal assistance services in Orange County.  
Objective 2.7: Expand in-home and community respite support services that enable Orange County residents to age in place.  
Objective 2.8: Ensure that more older adults in                                                                 |                  |                                                                                                                                                 |
| Goal 3: Empower older adults to enjoy optimal health status and to have a healthy lifestyle. | Objective 3.1: Promote wellbeing and the prevention and maintenance of chronic disease for all older adults in Orange County through increased access to evidence-based programs.  
Objective 3.2: Ensure that older adults and their families can access appropriate care for their health needs.  
Objective 3.3: Improve quality of and access to mental health and substance abuse services for older adults and their families.  
Objective 3.4: Collaborate with faith-based groups and other chaplaincy organizations to provide for the psychological, emotional, and spiritual needs of older adults. | PE addresses objectives 3.1, 3.2 and 3.3 by providing its Senior Leaders with information through its course content, and building relationships between Senior Leaders and relevant resources and services. |
| --- | --- | --- |
| Goal 4: Promote the safety and rights of older and vulnerable adults and prevent their abuse, neglect, and exploitation. | Objective 4.1: Collaborate with Emergency Management Services (EMS) to improve services for older residents of Orange County.  
Objective 4.2: Improve the quality of programs and services provided to residents of long-term care facilities, nursing homes, assisted living facilities, and family care homes in Orange County.  
Objective 4.3: Increase older adults’ ability to protect themselves from exploitation, abuse, and neglect. | PE addresses all three objectives through building meaningful relationships between Senior Leaders, EMS, assisted living facilities, and through information dissemination about emergency preparedness and assisted living facilities. |
| Goal 5: Empower older adults to engage in the community through volunteerism, lifelong learning, and civic activities. | Objective 5.1: Promote lifelong learning of older adults through increased access to continuing education classes and programs throughout the community.  
Objective 5.2: Encourage the participation of older adults and their advocates in housing and transportation planning efforts in Orange County. | PE directly addresses the first objective through its program, and indirectly addresses the second objective by creating relationships between Senior Leaders and housing and transportation services agencies. |
<p>| Goal 6: Prepare Orange County for an | Objective 6.1: Promote aging preparedness so that the Orange County community and its residents may be better able to transition to senior living. | PE addresses the first and last objectives, by empowering enabling Senior Leaders with |</p>
<table>
<thead>
<tr>
<th>Aging Population</th>
<th>Objective 6.2: Develop advocacy efforts for local, state, and federal programs, which will support older adults.</th>
<th>the tools to disseminate aging preparedness information to their communities, and helping to develop working relationships. Further, PE increases OCDOA’s capacity to assist Orange County older adults.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Objective 6.3: Maintain existing and seek new revenues for services and programs that serve the aging needs of Orange County.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Objective 6.4: Increase the capacity of the Department on Aging to expand activities available for older adults living in Orange County.</td>
<td></td>
</tr>
<tr>
<td>Goal 7:</td>
<td>Objective 7.1: Promote increased opportunities and rewards for professional training in aging issues relevant to Orange County.</td>
<td>X</td>
</tr>
<tr>
<td>Promote an adequate direct care workforce for an aging population and opportunities for older workers.</td>
<td>Objective 7.2: Increase work support opportunities for older adults in Orange County.</td>
<td>PE addresses the first objective by providing Senior Leaders rewarding opportunities for training in aging issues.</td>
</tr>
<tr>
<td>Goal 8:</td>
<td>Objective 8.1: Monitor the Orange County Department on Aging’s fulfillment of the 2012-2017 Master Aging Plan so that county resources are used wisely.</td>
<td>X</td>
</tr>
<tr>
<td>Maintain good stewardship of publicly funded services.</td>
<td></td>
<td>PE intends to utilize its resources wisely and effectively.</td>
</tr>
</tbody>
</table>
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