# The Influencing Factors and Process of Becoming and Remaining an Age-Friendly University

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# Declaration

I hereby certify that this material, which I now submit for assessment on the programme of study leading to the award of Doctor of Education (EdD), is entirely my own work and that I have exercised reasonable care to ensure that the work is original and does not to the best of my knowledge breach any law of copyright, and has not been taken from the work of others save and to the extent that such work has been cited and acknowledged within the text of my work.

Signed: *Christine O'Kelly*  (Christine H. O'Kelly)

ID No. 18213693                          Date: 13th  May 2024

# Dedication

To my parents, Evelyn and Edmund O'Kelly, who instilled a love of learning and encouraged my curiosity.

To my siblings and extended family, thank you for your support and encouragement.

Finally, to my husband Bob and my children Daniel, Dylan, Hannah, Elliott and Samuel –

I love you with all my heart.

# Acknowledgements

# Abstract

**The Influencing Factors and Processes of Becoming and Remaining an Age-Friendly University**

Population ageing and urbanisation are twin global trends shaping the 21st century. The rise of older populations in expanding cities underscores their value as assets for families, communities, and economies in fostering supportive living environments. The World Health Organization (WHO) defines active ageing as a lifelong process influenced by various factors that promote health, participation, and security in older adult life. In 2006, the WHO initiated the Age-Friendly Cities Programme, delineating eight domains to foster healthy and active ageing as both the physical and social environments within our cities and communities significantly shape the experiences and opportunities of older people. Universities contribute to fostering an age-friendly society through their roles in education, research, wellness initiatives, and providing cultural and social opportunities.

In 2012, Dublin City University (DCU) launched the Ten Principles of an Age-Friendly University. This initiative influenced the development of a global network of over 100 higher education institutions committed to implementing these principles. A substantial and expanding body of literature delineates age-friendliness across various domains such as cities, businesses, housing, healthcare, transportation, and communities, fostering collaborative efforts to define best practices. However, the concept of an Age-Friendly University is relatively new. Scant literature exists on the process of AFU members towards joining the global network or the factors influencing their decisions. The interpretation and implementation of AFU principles vary globally, warranting research due to the network's rapid growth. This study addresses this gap by investigating the influencing factors and processes involved in becoming and maintaining AFU status. It will delve into the decision-making considerations, analyse the interpretation and implementation of the Ten Principles, and identify their broader impact on higher education.

The pioneering study employed a mixed-methods approach, integrating a quantitative survey, two case studies (McMaster University, Canada and the University of Masaryk, Czech Republic), and document analysis. Key findings reveal that prioritised principles such as intergenerational learning, promoting longevity dividends, and integrating older people into core university activities are of prime importance to members of the Age-Friendly University Global Network and are influenced by critical factors including societal needs, fostering age inclusivity, and promoting intergenerational engagement.

Christine H. O'Kelly

# Glossary of Terms and Acronyms

| | |
|---|---|
| AFAR | American Federation on Ageing Research |
| AFCP | Age-Friendly Cities Programme |
| AFGN | Age-Friendly Global Network |
| AFGUN | Age-Friendly University Global Network |
| AFI | Age-Friendly Ireland |
| AFU | Age-Friendly University |
| AFUIG | Age-Friendly University Implementation Group |
| AFUN | Age-Friendly University Network |
| AFUWG | Age-friendly University Working Group |
| AGE | AGE Platform |
| AGHE | Academy for Gerontology in Higher Education |
| ANOVA | Analysis of Variance |
| AODA | Accessibility for Ontarians with Disabilities Act |
| AP | Atlantic Philanthropies |
| ASU | Arizona State University |
| CA | Canada |
| CERA | Centre for the Study of Ageing |
| CERPEC | Pedagogical Competence Development Center |
| CIHR | Canadian Institute for Health Research |
| CLSA | Canadian Longitudinal Study on Ageing |
| CoP | Community of Practice |
| CSO | Central Statistics Office |
| CSR | Corporate Social Responsibility |
| DCU | Dublin City University |
| DG | Director General |
| DNA | Deoxyribonucleic Acid |
| EAB | Expert Advisory Board |
| EDI | Equality, Diversity and Inclusion |
| EU | European Union |
| FSS | Faculty of Social Studies |
| HEA | Higher Education Authority |
| HR | Human Resources |

| | |
|---|---|
| IAGG | International Association of Gerontology and Geriatrics |
| IFA | International Federation on Ageing |
| ILC | International Longevity Centre |
| ISO | International Standards Organisation |
| IT | Information Technology |
| LGBQTI | Lesbian, Gay, Bisexual, Transgender, and Intersex |
| LLLP | Life Long Learning Programme |
| MIRA | McMaster Institute for Research on Ageing |
| MOOC | Massive Open Online Course |
| NCA | National Council for the Aged |
| NCAOP | National Council on Ageing and Older People |
| NIACE | National Institute of Adults Continuing Education |
| NPAS | National Positive Ageing Strategy |
| OECD | Organisation for Economic Cooperation and Development |
| OER | Open Educational Resources |
| OPC | Older People's Council |
| OPVEA | Office of the Vice President for External Affairs |
| SDG | Sustainable Development Goals |
| SPSS | Statistical Package for the Social Sciences |
| SU | Student Union |
| TILDA | The Irish Longitudinal Study on Ageing |
| TOR | Terms of Reference |
| U3A | University of the Third Age |
| UK | United Kingdom |
| UN | United Nations |
| UNECE | United Nations Economic Commission for Europe |
| UNESCO | United Nations Educational, Scientific and Cultural Organization |
| USA | United States of America |
| VP | Vice President |
| WHO | World Health Organisation |

# Table of Contents

# List of Figures and Tables

# Chapter 1: Introduction and Rationale

"Research is seeing what everybody else has seen and thinking what nobody else has thought.**" *Albert Szent-Györgyi,***1893-1986**

## 1.1    Introduction

This chapter introduces and explores the influencing factors and process of becoming and remaining an Age-Friendly University (AFU). It represents the first comprehensive academic investigation into the AFU phenomenon. It examines how the AFU Global Network (AFUGN) evolved from an initiative at Dublin City University (DCU) to an Age-Friendly University Global Network (AFUGN) of over 60 universities representing Europe, North and South America, Southeast Asia and Australia. It explains how the Ten Principles of an AFU developed by DCU were developed, the influencing factors and benefits of becoming and remaining an age-friendly campus, how the process occurred and how the Ten Principles of an AFU are being interpreted and implemented.

Ageing encompasses every aspect of human life. It is a dynamic, relational process that provides opportunities and challenges that demand adaptation and innovative responses in the fast-moving world. Since the Age-Friendly Cities Programme launched in 2008, there have been tremendous strides in adapting cities to become more age-friendly. Embraced by businesses, local and national governments, hospitals, transport providers, and housing, the natural move towards age-friendly education offers opportunities through the university sector to embed ageing in the curriculum and prepare future generations of professionals to understand ageing.

## 1.2    Context of the Emergence of Age-Friendly Universities

The AFUGN is a network of higher education institutions committed to the Ten Principles of an AFU. The genesis of the AFUGN is in the Age-Friendly Cities Programme launched by the World Health Organisation (WHO) in 2008 (WHO, 2008), which highlights eight domains that cities and communities can address to better adapt their structures and services to the needs of older people. These refer to the built environment, transport, housing, social participation, respect and social inclusion, civic participation and employment, communication, community support and health services. These domains are

as relevant to university campuses as they are in cities, as campuses are, in essence, small towns. For example, in addition to teaching, learning and research, DCU facilitates transport services, provides accommodation, retail outlets (grocery shop, a hair salon, pharmacy, garden produce), banking, leisure, entertainment, wellbeing, sports facilities and space for religious worship. As an asset to the broader community and a place of work and education, it ignited the interest of the President of Dublin City University, Prof. Brian MacCraith, to explore how a university could become age-friendly and highlight the intersection of population ageing and urbanisation, emphasising their implications for social gerontology and education.

## 1.3    Genesis of the Age-Friendly University Global Network

In March 2011, DCU's president established a Working Group to recommend measures that DCU could adopt to make the university more 'age-friendly'. While the term 'age-friendly' can potentially apply to all ages, the particular brief given by the President to the Working Group interpreted 'age-friendly' to mean older people (over the age of 60). The Working Group initially focused on older students, staff members (particularly retired ones), and older campus users. Internal and external stakeholders were also invited to participate in the consultation process. Since DCU was established in 1989, many policies and initiatives have been developed to make the university more inclusive. Several initiatives were already considered 'age-friendly', but the group's focus was explicitly on developing the age-friendly initiative within the Terms of Reference set up for the Working Group. The focus was on three main areas: the needs of older learners, older and retired staff members, and older campus users. Following extensive consultation and asset mapping of the university, a report detailing the elements of an Age-Friendly Plan for DCU was issued. It outlined the benefits of adopting an age-friendly policy for DCU, examined Age-Friendly Educational Programming, dealt with the needs of older and retired staff members, and reflected the concerns of older campus users. Each area outlined specific observations and recommendations on how DCU might approach the opportunity of becoming age-friendly. In partnership with external stakeholders, the report led to the development of the Ten Principles of an AFU, launched in 2012, marking the E.U. Year of Intergenerational Solidarity. These complemented the WHO age-friendly themes, applying them to a higher education setting.  The Ten Principles of an Age-Friendly University are listed in Table 1.3 below.

**Table 1.1. Ten Principles of an Age-Friendly University**

**The Ten Principles of an AFU are:**

1. To encourage the participation of older adults in all the core activities of the university, including educational and research programmes.
2. To promote personal and career development in the second half of life and to support those who wish to pursue 'second careers'.
3. To recognise the range of educational needs of older adults (from those who were early school-leavers through to those who wish to pursue Master or PhD qualifications).
4. To promote intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages.
5. To widen access to online educational opportunities for older adults to ensure a diversity of routes to participation.
6. To ensure that the university's research agenda is informed by the needs of an ageing society and to promote public discourse on how higher education can better respond to the varied interests and needs of older adults.
7. To increase the understanding of students of the longevity dividend and the increasing complexity and richness that ageing brings to our society.
8. To enhance access for older adults to the university's range of health and wellness programmes and its arts and cultural activities.
9. To engage actively with the university's retired community.
10. To ensure regular dialogue with organisations representing the interests of the ageing population.

## 1.4 Identification of the Research Topic

### 1.4.1 Scope of the study

This study provides valuable insight into influencing factors and the process of becoming and remaining an Age-Friendly University. It encompasses a significant timeframe, spanning 2012, marked by the launch of the Ten Principles of an Age-Friendly University (AFU), to 2021. This period provides a comprehensive snapshot of the evolution of the AFU concept, coinciding with the unprecedented global pandemic outbreak. It examines the interpretation, implementation and best practices gleaned from a decade of experience, informing efforts to create age-friendly environments that benefit individuals of all ages.

During this time, the AFU initiative underwent substantial development and refinement, reflecting the dynamic interplay between societal needs, academic endeavours, and the changing landscape of higher education. The emergence of the global pandemic in 2020 further underscored the relevance and urgency of age-friendly practices within university settings, as older adults became particularly vulnerable to the virus's impacts.

Throughout this period, universities worldwide grappled with the challenge of adapting to the evolving needs of their students and ageing populations while navigating the complexities of the pandemic. By examining the period from 2012 to 2021, this study offers insights into the transformative potential of the AFU concept, shedding light on its capacity to foster resilience, innovation, and inclusivity within higher education institutions.

### 1.4.2    Rationale for the Study

Worldwide, the number of people over the age of 65 is increasing. In an Irish context, the projections reflect current global trends, and Ireland's older population is expected to grow is expected to grow significantly. The projected increase is from approximately 768,900 in 2022 to around 1.6 million by 2051. It represents a growth of over 100%, essentially doubling the number of older people in the country (Central Statistics Office, 2022). This increase in the older population will result in significant demographic shifts, with the proportion of those aged 65 and over increasing from 15.1% of the total population in 2022 to a much larger share by mid-century. The exact percentage growth depends on various factors, including migration rates and changes in life expectancy.  This section of the population has diverse educational needs, which are currently poorly provided for within the third-level sector, and the pressure to meet these needs will increase. Internationally, many universities are starting to make provisions for the needs of older learners, but in 2012, there was very little third-level education targeted at older learners in Ireland. DCU examined the advantages of positioning itself (both nationally and internationally) as a leading AFU and the possibility of not just a place for older adults to attend but also as a centre of excellence in research, teaching, advocacy, and engagement for older adults, particularly in relation to existing areas of expertise.

The rationale for the study lies in recognising the multifaceted benefits of positioning universities as Age-Friendly Universities (AFUs). By doing so, universities can:

- **Bolster research opportunities**: AFUs can access funding and consolidate expertise across various domains to address ageing-related challenges comprehensively.
- **Promote lifelong learning and innovation**: Implementation of age-friendly principles fosters a culture of lifelong learning, challenges ageist stereotypes, and encourages the development of innovative solutions to support independent living and workforce practices.
- **Enhance economic competitiveness**: AFUs can tap into the expertise of older workers, generate revenue through lifelong learning programs, and leverage multidisciplinary research grants, thereby contributing to economic growth.
- **Foster community engagement**: Being age-friendly fosters engagement with older populations in the community, enriching societal connections and benefiting from their contributions to economic, intellectual, and social capital.
- **Provide benefits to older learners**: Participation in third-level learning offers older people various benefits, including mental stimulation, social interaction, empowerment, and the breakdown of age-related stereotypes, contributing to positive ageing, health and well-being.

### 1.4.3   Contribution to Research

The Age-Friendly University (AFU) initiative advances the existing body of ageing research by promoting intergenerational learning, fostering societal inclusivity, and implementing age-friendly principles, thus enhancing older people's well-being and active engagement in academic and community settings.  Key contributions to research in social gerontology and education include:

- **Integration of Age-Friendly Concepts in Urban and Academic Environments**: The World Health Organisation's Age-Friendly Cities Programme underscores the importance of adapting both physical and social environments to support older adults. This aligns with social gerontology's focus on understanding the social, psychological, and biological aspects of ageing. By advocating for age-friendly urban design, the AFU contributes to gerontology by promoting environments that enhance the well-being and participation of older adults.

- **Role of Universities in Promoting Active Ageing**: Universities play a crucial role in fostering age-friendly environments through education, research, wellness initiatives, and cultural activities. This is highlighted by the Ten Principles of an Age-Friendly University (AFU), developed by Dublin City University, and their global adoption. It illustrates the expanding role of educational institutions in supporting lifelong learning and active ageing, which is a significant contribution to education and gerontology.

- **Intergenerational Learning and Engagement**: It emphasises the importance of intergenerational learning, integrating older adults into university activities, and promoting the benefits of longevity (longevity dividends). This focus on intergenerational engagement supports social gerontology's aim to improve social cohesion and mutual support between different age groups. From an educational perspective, it encourages the inclusion of older adults in learning environments, fostering a more inclusive and diverse educational experience.

- **Need for Research on Age-Friendly Universities (AFUs)**: The study's investigation into the factors and processes involved in becoming and maintaining AFU status addresses a gap in the existing literature. It contributes to social gerontology by providing insights into how institutions can effectively support older adults. It informs the development of policies and practices that enhance the participation of older learners and the integration of age-friendly principles from an education perspective.

- **Global Network and Best Practices**: Expanding a global network of age-friendly higher education institutions promotes sharing best practices and collaborative efforts to support ageing populations. It contributes to disseminating knowledge and implementing effective strategies in gerontology and education, facilitating a more coordinated and informed approach to addressing the challenges and opportunities of an ageing society.

Examining how universities can embrace the opportunities of ageing and actively engage older people is crucial for promoting academic discourse, societal inclusivity, and the well-being of older people and the wider community. This underscores the value of older people as societal assets, the importance of supportive environments, and universities' pivotal role in fostering active ageing and intergenerational learning. It bridges social gerontology and

education by highlighting the need for research, collaboration, and implementing age-friendly principles across various contexts.

### 1.4.4   *Motivation for the Study*

My interest in ageing stems from a combination of personal passion, professional expertise, and recognition of the profound societal impact of demographic shifts. Over the past thirty years, I have witnessed firsthand the challenges and opportunities of ageing, either through interactions with older family members, my own experiences as I have aged or my engagement in the professional ageing arena.  The social impact of ageing cannot be overlooked. Ageing is a universal process that affects individuals, families, and communities. I am motivated to enhance the quality of life for myself as I age, support older people, and address the societal challenges of an ageing population.  With over thirty years of experience working in the ageing arena, I believe I deeply understand the complexities and nuances of ageing-related issues, which fuels my interest in exploring and addressing these issues. From a research and innovation perspective, ageing presents a rich field for research in various disciplines, especially social gerontology, education and innovation, with opportunities to develop new technologies, interventions, and policies to support healthy ageing and improve outcomes for older people. I wish to contribute to cutting-edge research and practical solutions to adopting and promoting age-friendly practices in higher education. The global significance of ageing is a global phenomenon, with implications for healthcare, social services, and economic productivity, and fuels a motivation to contribute to global efforts to address the challenges and opportunities associated with population ageing.

## 1.5    Overview of Chapters

Chapter 2 sets out the context of the study and examines the genesis of the AFU concept, the influence of the Age-Friendly Cities movement and the factors that influenced the development of the Ten Principles of an AFU.

Chapter 3 reviews the literature on ageing and the broader Age-Friendly Cities approach. It also examines the Ten Principles and the literature that informs them and discusses why universities exist and function in society. The Sustainable Development Goals and their implementation are also reviewed in the context of higher education.

Chapter 4 outlines the research study's methodology, approach, rationale and execution.

Chapter 5 presents the research findings from a mixed method study combining a quantitative survey with two case qualitative studies and document analysis.

Chapter 6 discusses the research findings in the context of the literature reviewed and discusses the broader implications of the factors and processes of becoming and remaining an AFU.

Chapter 7 concludes the study and recommends further research on the AFU University concept. It also provides recommendations for future research and observations on the AFU concept.

# Chapter 2: Context

## 2.1 Introduction

A review of the evolution of the Age-Friendly Cities Programme (AFCP) informed Dublin City University's (DCU) rationale for how the Age-Friendly University (AFU) evolved. This chapter delves into this phenomenon within the context of an age-friendly university. It explores the evolution of the AFCP and how it was adopted and implemented in Ireland, from a pilot project in County Louth to being rolled out nationally, culminating in the World Health Organisation's (WHO) recognition of Ireland as the first age-friendly country in the world. It examines the history of ageing policy in Ireland and the national impact of the AFCP. It charts the development and implementation of the Ten Principles of an Age-Friendly University in DCU and its relationship to national and global education policy and the evolution of the Age-Friendly University Global Network (AFUGN).

## 2.2 Age-Friendly – How did it begin?

The term "age-friendly" gained global significance through the efforts of Prof. Alexandre Kalache and his collaborators during his tenure at the WHO. Kalache sought to establish a lasting legacy in the field of ageing, recognising the untapped potential for global leadership in this area due to frequent administrative changes. He emphasised the impact of urbanisation on the health needs of the ageing population, with projections indicating that by 2030, 60% of the world's population will reside in urban areas. An overview of the origin of the Age-Friendly Cities concept (see Appendix I) and a brief history of ageing in Ireland provides context to the emergence of the Age-friendly Cities Programme (see Appendix II)

## 2.3 Age-Friendly in Ireland – A National Context

Inspired by the Vancouver Protocol, a framework for creating age-friendly communities, Louth County Council, under the leadership of Conn Murray, became the first local authority in Ireland to launch the Louth Age-Friendly County Initiative in 2008. This groundbreaking project, guided by a dedicated Project Manager, laid the foundation for subsequent initiatives such as the Ageing Well Network.

The Ageing Well Network (AWN) emerged nationally in 2007 to address the challenges an ageing population poses. This non-statutory independent think tank provided a platform for senior-level executives from various sectors to collaborate, exchange ideas, and develop strategies benefiting Ireland's older population. Funded by the Atlantic Philanthropies (AP) for six years, AWN facilitated dialogue among leaders from over 75 organisations, spanning government, business, academia, and civil society. It broadened the scope of ageing discussions beyond health-related issues to encompass various aspects of well-being. For instance, AWN fostered academic collaboration, encouraged civic engagement with older adults, and advocated for policy changes within the system. In 2011, AWN co-hosted the 1st International Conference on Age-Friendly Cities in Dublin with the WHO, resulting in the signing of the Dublin Declaration on Age-Friendly Cities, a commitment made by cities and communities to create urban environments that support and enhance the quality of life for older people. This declaration stems from recognising that ageing populations require specific considerations to ensure their well-being, independence, and active participation in community life. It is part of a broader global movement to make cities and communities more inclusive and accessible for people of all ages, particularly older people. Representatives from 38 cities signed the Declaration. This initiative and submissions to the National Positive Ageing Strategy contributed to developing Ireland's internationally recognised Age-Friendly Cities and Counties Programme.

## 2.4    Age-Friendly – Dublin City University

In 2010, Professor Brian MacCraith assumed the presidency of Dublin City University (DCU) after being an active member of the Ageing Well Network (AWN). Inspired by his involvement in AWN, MacCraith announced DCU's ambition to become the world's first Age-Friendly University (AFU) during his inauguration. He credited his participation in AWN for shaping his vision. Following this, in January 2011, MacCraith initiated the formation of the Age-Friendly University Working Group (AFUWG) at DCU, comprising staff from various departments. Over three months, the AFUWG met six times to develop actionable recommendations for making DCU age-friendly. These recommendations included on-campus and off-campus activities, leveraged technology platforms, and addressed the aspect of social responsibility, such as providing support for older people who might feel intimidated visiting the campus. The AFUWG also consulted with various

stakeholders.[1], including national and international educational organisations, older people's community groups, and retired DCU staff and students.

Over four months, the Age-Friendly University Working Group at Dublin City University (DCU) deliberated on various ideas within the context of existing activities at the university. Evidence from a research project by Dr Trudy Corrigan called the "Intergenerational Learning Programme" highlighted the demand for intergenerational learning opportunities. The group explored initiatives such as summer and weekend programs, voluntary roles for retired individuals, and workshops offering access to sports and library facilities. They also discussed the importance of a lifelong learning program and the university's role in advocacy and policy formation related to older learners' needs and their impact on well-being and health.

Consultations with external stakeholders further informed the discussions, revealing needs such as accessible environments, IT training, flexible daytime classes, and opportunities for intergenerational collaboration and research. Marketing strategies, cost-effective modules, home-sharing options, and considerations for longer careers and evolving retirement expectations were also discussed.

By the end of 2011, the working group produced a final report advocating for developing an operational framework to establish DCU as an Age-Friendly University (AFU). The External Advisory Board (EAB), consisting of organisations and individuals working with older people, supported the initiative.

In May 2012, the working group presented a draft framework, the "Ten Principles of an Age-Friendly University," to the EAB. Emphasising the importance of a shared experience and partnership approach, the EAB highlighted the need to avoid equating ageing solely with "old age" and instead promote a process that unites all age groups. DCU's focus on enterprise and technology provided an opportunity to engage older individuals as potential students. MacCraith launched the Ten Principles in September 2012, aligning with the EU Year of Active Ageing and Solidarity between Generations.

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[1] Age Action, Age and Opportunity, Older Women's Network, Active Retirement Ireland, Retirement Planning Council, DCU Students Union and staff, UNESCO, Aontas.

In September 2012, Taoiseach (Prime Minister) Enda Kenny formally launched the Ten Principles of an Age-Friendly University and said

> Through this initiative, DCU is taking a leadership role in preparing society for the multifaceted challenges of our ageing demographic. It will actively encourage older people to come into our higher education institutions and to become involved in shaping university programmes. The age-friendly activities being promoted are both relevant and correctly targeted at promoting the quality of life of our older men and women. It is truly a pioneering initiative.

Although the AFU Initiative developed by DCU was primarily conceived in an Irish context for the DCU community, during the summer of 2012, the University of Strathclyde and Arizona State University embraced the concept following institutional visits, and this laid the foundations of an Age-Friendly University Global Network (AFUGN).

At the launch of the Ten Principles, MacCraith reiterated DCU's commitment to providing opportunities for people of all ages to engage in education, wellness and cultural activities.

> By pioneering the inclusion of older adults in all aspects of university life, we recognise the 'longevity dividend' and the increasing complexity and richness that ageing brings to our society. We are delighted that universities in the US and UK are joining us today and embracing this initiative.

## 2.5    The Ten Principles and Education Policy

The Ten Principles of an Age-Friendly University (AFU) align with national policies set by the Higher Education Authority (HEA) and the Action Plan for Education by the Department of Further and Higher Education, Research, Innovation and Science in 2019. At Dublin City University (DCU), the institution's Action Plan for Education mirrors its mission to "transform lives and societies" (DCU, 2018) through a commitment to delivering a quality learning experience. This involves empowering learners of all ages and levels with diverse opportunities enriched by innovation, discovery, and research.

The Principles also conform with the National Plan for Equity of Access to Higher Education (Department of Education and Skills, 2015). The Sustainable Development Goals (SDGs; UN, 2016) include many threads common to higher education. Goal 2, "to ensure inclusive and equitable quality education and promote lifelong learning opportunities for all," resonates with the National Access policies' overall vision and government strategies. UNESCO's Lifelong Learning Policies and Strategies programme

advocates and advances lifelong learning. General Comment 13 of the UN Right to Education devoted two articles to the right to education in international human law (UN, 1999). The Ten Principles echo and reflect many aspects of these policies, discussed in greater detail in Chapter 3.

## 2.6 The implementation of the Ten Principles in DCU

Throughout 2013, the AFUWG continued to meet and discuss university activities against the Ten Principles (Colgan, 2013). From the breadth and scope of work, a need for a cohesive approach and a dedicated appointment to ensure the Principles' implementation at a multidisciplinary level across the institution became apparent. Therefore, in early 2012, DCU advertised a position for an Age-Friendly Coordinator (Colgan, 2012) to work closely with the AFUWG members to implement a strategic vision for the AFU and facilitate DCU's age-friendly activities and initiatives. The appointed AFU Coordinator started in September 2014 and was assigned to the vice president for External Affairs (OPVEA).

The AFU Coordinator brought a wealth of experience on ageing issues and had a robust and respected voice in the ageing sector. However, despite this, effectively implementing the Ten Principles and navigating the university's academic landscape proved challenging. Therefore, with the approval of the President, the AFU Coordinator drafted Terms of Reference (TOR) for a newly formed Age-Friendly University Implementation Group (AFUIG) comprising multidisciplinary input which examined the Ten Principles under five pillars: Research and Innovation; Teaching and Learning; Lifelong and Intergenerational Learning; Encore Careers and Enterprise; and Institutional Change (O'Kelly, 2014b). The group's primary objectives were to host the first AFU Conference, draft a governance document for the global network, and broaden DCU opportunities to engage older people. The process and rationale for joining the AFU also became the responsibility of the AFU coordinator.

### 2.6.1 Process of Joining the AFU Global Network

As the AFUGN grew, it became clear that a joining process needed to be developed. Lim (2022) identified the "somewhat abstract" concept of the AFU as a barrier to higher education's engagement with the concept. It is a significant exploration because it explores

the growing need for higher education institutions to become inclusive and supportive environments for older adults. The paper argues for a shift in how universities perceive and engage with older adults, recognising them as an important demographic that can benefit significantly from educational opportunities. This shift is increasingly relevant given the ageing global population and the need for continuous learning in a rapidly changing world. The process developed by the AFU Coordinator suggested convening a stakeholder group and mapping the Principles to the university's activities. The stakeholder group was advised to consider the mission and vision of the institution, the strategic plan, the SDGs, and broader national, global, educational, and societal considerations.

Creating and documenting an accessible process helped potential members to identify who and what was relevant to their application to become an AFU (Greenwood, 2020). The process must align with the institution's goals and involve the right stakeholders to be effective and credible. It also needs to outline the steps to achieve the task. Dickson (2018) suggests that the rationale to complete a process provides benefits but also requires discipline, especially when it allows people to opt into a process on their own terms. The flexibility to interpret and implement the Ten Principles recognises that. Implementing a structured process has several benefits:

- Improves the chances of the institution being accepted into the AFUGN.
- Formalises management expectations by setting out tasks and identifying assets through mapping, identifying roles and responsibilities, action plans, progress and how these are addressed.
- Helps allocate resources.
- Provides opportunities for oversight and identifies new areas for development.
- Provides accountability.
- Helps resolve solutions to issues that occur.
- Provides a mechanism for quality assurance checks.
- Helps to collate and validate metrics.

Establishing a process to join and remain in the AFUGN also helps when reviewing activities to assess the validity of how the Ten Principles are interpreted and implemented (Dunham et al., 2020). Written instructions for the process are essential so they can be easily referred to and remembered. A downloadable document outlining the process and steps was listed on the DCU AFU homepage (O'Kelly, 2014a).

### 2.6.2   2015 and Beyond

By the end of 2015, the Age-Friendly Initiative was garnering global recognition. A successful conference titled "Universities as Engines of Active and Healthy Ageing," organised by the Age-Friendly Coordinator and supported by a review committee led by Prof. Mark Morgan (DCU), was held at DCU. This event attracted over 200 delegates from around the world. The keynote speaker, Dr Jane Barratt, Secretary-General of the International Federation on Ageing, said

> Age-Friendly Universities (AFU), through the application of its ten principles, has the potential to positively impact the lives of generations of older people across the world. The World Health Organization's (WHO) World Report on Ageing and Health is a timely and appropriate vehicle for AFUs to map a pathway that responds to the educational spirit of all ages by shaping current and future educational opportunities. It is imperative that AFUs are adequately resourced and focused on building bridges across sectors and disciplines to fulfil their mandate. The International Federation on Ageing (IFA), INGO, an official status with the United Nations and WHO, stands ready to work with Dublin City University (DCU) and other age-friendly universities toward growing this important network globally and developing an understanding as to how to measure its impact.

Engagement with older people continued to grow on campus during 2016-17. Older people took part in campus walkability audits using the age-friendly cities framework that mapped accessibility and assets on campus (Jones, 2014). A walkability audit aims to determine how walkable an environment is, especially for older persons, by adhering to the maxim, "If one designs for the young, one excludes the old, but by designing for the old, everyone is included". The outcomes of campus walkability audits informed actions to improve the public realm. Following meetings with schools and faculty, new registration protocols supported older people in undertaking modules for audit from undergraduate and master's programmes, which provided an immersive experience for older people and increased age visibility on campus. Participants were provided with a student card, library access and email address.

A customised Love of Lifelong Learning Programme (LLLP) was introduced to encourage older people to engage informally with various formal topics, fostering their interest in higher education programs and helping them navigate the university environment. The External Advisory Board (EAB) collaborated with the AFU Coordinator to raise awareness of ageing issues through events such as the UN Day of Older People (October 1st) and the EU Day of Intergenerational Solidarity (April 29th). Older people were encouraged to

participate more actively in research by co-creating and contributing to the research agenda. Additionally, the Irish Senior Citizens Parliament, representing over 38,000 older people, was hosted on the DCU campus, facilitating direct communication between the university and older people and providing insights into ageing issues at both grassroots and policy levels (O'Kelly, 2014a).

### 2.6.3   Age-Friendly Thematic Approach at DCU

Universities are primarily located in large urban areas, many of whom aspire to be age-friendly (van Hoof *et al.*, 2021). Nevertheless, no evidence showcased the practical implementation of the Age-Friendly Cities (United Nations, 2007) 8-part thematic approach to ageing within a higher education setting. Not until DCU concurrently applied it to their institution alongside the Ten Principles did such evidence emerge.

**Ten Principles linked in with AFC Programme**

Live information on bus routes and access to campus

Ava Project (retrofitting homes)

Review of campus accommodation

Improvements to DCU public realm

Love of Lifelong Learning (3LA) Educational Programme

Contributions to Research (Nex/VR)

Changing the narrative on ageing – ageism awareness/intergenerational and lifelong learning/ contribution to policy and decision making
Principle 1

Regular newsletters/information and correspondence on activities of interest, policy and decision making

Membership of Dublin and Fingal Age -Friendly Alliances/ISCP

Encore career opportunities

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**Figure 2.1. A sample of how the Age-Friendly Cities thematic approach is implemented at Dublin City University (O'Kelly, 2022).**

### 2.7   AFU Global Growth

At a global level, the AFU initiative instigated by DCU gained momentum, and by the end of 2017, membership in the global network had grown to over 35 universities. In 2018, a

second international conference hosted by DCU, "New Frontiers of Ageing – Research, Policy and Practice," brought global ageing experts together to discuss a broad range of themes[2]. They discussed how an AFU could collaborate with higher education, civic society, policymakers and industry to maximise opportunities to promote successful ageing research, policy and practice (O'Kelly, 2017). The keynote speaker, Professor Alexandre Kalache (2019, p. 10), applauded the age-friendly university concept, saying

> We are in the Fourth Industrial Revolution. We need to optimise opportunities in four key areas: health, life-long learning, participation in society, security, protection, and peace of mind, so we are not abandoned later in life. These four pillars are necessary to promote quality of life as we age. Universities are in a unique position to lead this. There is a need for inclusive learning opportunities, valuing experience and metacognition, and bringing together different disciplines to enhance resilience, emotional intelligence, self-reflection, well-being, and empathy. These dimensions will be critical in the 21st century with much longer lives. I told you I strongly believe that you have wonderful experience already accumulated to have ten principles. To achieve a more age-friendly approach, we need to listen to the voices of people who are ageing, and we need adequate and appropriate responses from those who make decisions in the public sector, business and academia.

During the 2018 conference, DCU organised a meeting of AFUGN members to discuss the network's future. A draft governance document outlining the Terms of Reference (TOR) and structure of the AFUGN was circulated among founding members but not shared widely. To cover costs previously borne by DCU, such as international conferences and AFU staff expenses, the document proposed tiered membership fees, a structured advisory group, and voting rights for network members.

## 2.8 Age-Friendly University Global Network 2018 – 2020

In March 2018, DCU facilitated discussions among AFUGN members, evaluating the network's strengths and weaknesses, implementing the Ten Principles, and advancing collectively. These discussions delved into challenges such as articulating and operationalising the Principles, the benefits of network membership, defining the AFUGN's scope, and the necessity of formalising the network structure. These deliberations prompted critical reflections on the role of universities amidst demographic shifts. Participants questioned whether universities should prioritise involvement in ageing-

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[2] E.g., Creative Ageing, Technology & Health, Work and Enterprise, Community Engagement/Education Learner Engagment and Outreach Research & Innovation

related initiatives and how embedding ageing policies at an institutional level could enhance their core activities.

An essential aspect agreed upon at the meeting was the need to demonstrate the impact of embracing training and mainstreaming ageing in education, for example, in the undergraduate curricula. There was consensus that embracing the core pillars of higher education – teaching and learning, research innovation and engagement by reflecting institutional compliance and keeping the advocacy, research and research focus – was vital to its success. It also allowed universities to showcase their responsiveness to societal issues while embracing age inclusivity and providing practical support for ageing individuals. The consensus amongst the members was that a modest membership fee was needed to sustain the network and realise its ambitions for the future (O'Kelly, 2018a).

Following the meeting, Professor Cathy Eden from Arizona State University and Alix McDonald from the University of Strathclyde collaborated with the AFU Coordinator to finalise the governance document. Eden became the first visiting AFU scholar at DCU in the summer of 2018. By late autumn, the trio submitted a nearly completed draft governance document to the DCU president for approval (O'Kelly et al., 2018).

As interest in the AFU concept grew globally, the network naturally expanded. While there were no specific country targets, numerous institutions, particularly from the United States, joined the network and shared their different experiences implementing the Ten Principles. By January 2019, the AFUGN had surpassed 65 members. DCU created a website for AFUGN members to facilitate collaboration and information sharing. However, its launch was delayed until DCU management approved the governance document. In the meantime, AFUGN members engaged in numerous research collaborations and exchanges with institutions such as Pai Chai, McMaster University, Arizona State University, and Eastern Michigan University.

Throughout 2019, the AFU Coordinator actively promoted the network and worked to expand opportunities for ageing-related initiatives within DCU and the AFUGN. She participated in various international events, including addressing the UN Working Group on Ageing in New York and presenting at conferences across several countries. Meanwhile, ageing research, education, wellness, and cultural programs continued to

thrive on the DCU campus, with older individuals gaining increased visibility and a dynamic peer-led association organising social activities.

## 2.9    2020 – Covid 19

In January 2020, global concern heightened over a novel virus originating in Asia. As the coronavirus (COVID-19) spread, its severity led the WHO to declare it a pandemic by February. By March 2020, Ireland enforced a nationwide lockdown in response. Older individuals, recognised as particularly vulnerable, were mandated to stay home—schools, businesses, and industries adapted by implementing innovative measures to ensure safety while maintaining essential services. Universities swiftly transitioned their programs online and leveraged their resources to support local and national communities. The AFUGN shared responses and innovations on adapting to new working environments. AFU programmes moved online; DCU responded by providing Zoom and smartphone training and offering a contact service for AFU programme participants who need practical assistance or information. The Centre for Lifelong Learning at the University of Strathclyde, which has provided lifelong learning programmes for over forty years and is the largest in Europe, moved its entire programme online. At the same time, universities in Canada and the US provided practical support to colleagues and AFU participants in assisting their students through intergenerational programmes. To support programme participants, regular bulletins and online activities offered an opportunity to stay connected. One impact of the pandemic highlighted social inequalities, which affected both older and younger people (Buffel *et al.*, 2021). Broadband was lacking in some areas, people did not have a device, and many older people did not have the technical skills to participate. There was also a need for sensitivity as Zoom and other online platforms suddenly intruded into the private environment of the home, exposing living conditions (O'Kelly, 2020)

The pandemic highlighted issues of ageism and stereotyping of older people, fuelled intergenerational conflict and generated negative social media messages about COVID-19 and ageing, often characterising older people as helpless and expendable individuals that impacted the public's perception of social and economic policies associated with ageing (Kenny et al., 2020; McGarrigle et al., 2020; Soto-Perez-de-Celis, 2020).

By the summer of 2020, there were 70 universities in the AFUGN. However, the dedicated website for the AFUGN members funded by DCU remained on hold, as information on governance was still missing. In early July, MacCraith completed his tenure as President, and Prof. Daire Keogh took office. Naturally, the COVID-19 pandemic took precedence as Keogh moved to establish priorities and lead the university in unprecedented conditions. As the pandemic continued without an end in sight, 2021 brought even greater restrictions as more virulent strains of the virus emerged and hope to resume regular services faded (Hamama-Raz *et al.*, 2021). However, the AFUGN continued to grow throughout the pandemic, and by June 2021, 77 universities were in the network. There is currently no research evidence to understand why the AFUGN continued to grow; one possible reason may be that universities were reviewing their work on ageing in light of the pandemic or that the Ten Principles offered a mechanism for universities to engage ageing more robustly and pivot rapidly to meet emerging demands of a new cohort of campus users.

By mid-2021, global vaccination programmes had proved successful, and tentative plans to resume normal operations had started. The continued growth of the AFUGN confirms that universities regard themselves as having a role in responding to demographic change. The holistic framework developed by DCU resonated with the sector as DCU's generic approach and application are easily interpreted and implemented. DCU AFU initiated a process with a Working Group comprising global network members to set recommendations of standards for the Ten Principles with the International Standards Organisation (ISO). ISO standards are increasingly considered valuable for assessing an organisation's commitment and overall performance and will add validity to the Ten Principles and the AFUGN.

Without a governance document, the AFUGN website remained unfinished. Despite this, the AFU Coordinator facilitated information exchange, maintained member communication, and promoted their activities via social media platforms such as Facebook, Twitter, and Instagram. The lack of a governance document led to missed revenue opportunities for DCU and hindrances to collaborative research, policy development, staff and student exchanges, and event planning within the AFUGN. DCU identified finalising and distributing the governance document as a top priority, aiming to resolve this issue by Autumn 2021.

In Autumn 2021, DCU hosted the third AFU International conference, "The Future of Ageing and the Silver Economy." The three-day event focused on academic papers and discourse, followed by two other days concentrating on industry and enterprise. Keynote speakers included the Director of the Future of Ageing at the Milken Institute, the Global Coalition on Ageing, the World Bank and the OECD. Leaders from industry, academia, social entrepreneurs and policymakers also took part. A Resource Directory containing abstracts, contacts and details about the conference was made available to all participants post-conference (O'Kelly, 2021).

## 2.10    Conclusion

The evolution and growth in the AFUGN membership demonstrates that developing age-friendly practices resonated with higher education. As the network's growth continued, universities started to explore what age-friendly practices looked like in the context of higher education and how they could implement them. The Ten Principles offered a mechanism for institutions to unite and ignite an interest in learning from each other and harnessing an age-friendly approach to their work. The evidence to support the factors of influence and processes that promote engagement with the AFU concept is examined in the next chapter, which explores the literature on ageing and how the Ten Principles are informed.

# Chapter 3: Literature Review

## 3.1    Introduction

This study examines the influencing factors and processes of becoming and remaining an age-friendly university (AFU) and is the first substantial academic study of the AFU phenomena. Initially introduced by Dublin City University (DCU) in 2012, the AFU concept gained traction and was embraced by universities worldwide. By 2023, the AFU Global Network had expanded to include 123 universities across Europe, North and South America, Southeast Asia, and Australia. The study covers the period of substantial growth within the AFUGN network from 2017 to 2021.

The research focus on the influencing factors and process of becoming and remaining an Age-Friendly University (AFU) makes significant contributions to the body of research and knowledge on ageing in several key ways:

- **Expanding the Concept of Age-Friendly Institutions**:

It contributes to the broader understanding of age-friendly institutions by exploring how universities can be inclusive and supportive environments for older people. This expands the concept beyond traditional settings like healthcare and community services, highlighting the role of educational institutions in supporting lifelong learning and active ageing.

- **Identifying Key Influencing Factors**

The thesis examines the factors influencing the decision to become and remain an AFU and provides valuable insights into the drivers and barriers institutions face. These include institutional priorities, funding availability, cultural attitudes towards ageing, and the presence of supportive infrastructure. These findings can guide policymakers and university administrators in designing more effective age-friendly initiatives.

- **Highlighting the Role of Intergenerational Learning**

The research emphasises the importance of intergenerational learning and engagement within the university. This aspect is crucial as it fosters mutual understanding and respect between younger and older generations, enriching the educational experience for all students and creating a more inclusive academic environment.

- **Providing a Framework for Policy Development**

It offers a framework for developing and implementing age-friendly policies in universities. This includes recommendations on curriculum adaptation, infrastructure modifications, and the creation of supportive services for older people. Such a framework is instrumental for universities aiming to enhance their age-friendliness, offering practical guidelines that can be adapted to different institutional contexts.

- **Contributing to Global Discussions on Ageing**

The research adds to global discussions on ageing by focusing on the role of educational institutions in addressing the challenges and opportunities associated with an ageing population. As societies worldwide face demographic shifts towards older populations, this research underscores the need for inclusive policies that cater to the educational and social needs of older people.

- **Fostering Inclusive Educational Practices**

By investigating how universities can become more age-friendly, the study promotes inclusive educational practices that consider the diverse needs of students across all age groups. This includes developing teaching methods, support services, and campus environments that accommodate older students, fostering a more inclusive and supportive educational ecosystem.

- **Informing Future Research**

The study lays the groundwork for future research on age-friendly universities by identifying gaps in the current understanding and suggesting areas for further study. This includes exploring the long-term impacts of AFU initiatives on older people's educational outcomes and overall well-being and examining the cost-benefit aspects of implementing such programs.

In summary, the research study on the influencing factors and process of becoming and remaining an Age-Friendly University substantially contributes to the body of knowledge on ageing by broadening the scope of age-friendly initiatives, providing a framework for policy development, and promoting inclusive educational practices. It offers valuable insights that can inform both academic research and practical implementations, supporting

the creation of more inclusive and supportive environments for older people in higher education.

The review will also examine ageing definitions and present a synopsis of research relating to aspects of ageing, with a particular focus on the Ten Principles of the AFU. It will provide an overview of the literature on developing the Age-Friendly Cities Programme, the elements of the Ten Principles of an AFU, and broader Age-Friendly Ecosystems. The landscape concerning embedding change in higher education will, in turn, also be examined.

Machi and McEvoy (2009, p. 4) offer the following definition of a literature review:

> A literature review is a written document that presents a logically argued case founded on a comprehensive understanding of the current state of knowledge about a topic of study. The case establishes a convincing thesis to answer the study's question.

Punch (2013, p. 41) emphasises the added value brought by a researcher with professional knowledge of the research topic to the planning process. While a literature review offers valuable concepts, theories, and evidence, it can also shape perceptions of the study, potentially limiting its evolution (Punch, 2013). Maxwell (2009) concurs, stating that the literature review not only justifies a study but also guides methodological decisions, suggests alternative approaches, or flags potential issues with the plan. Additionally, it serves as a data source to test or challenge existing theories and formulate new hypotheses. Yin (2002, p. 14) advises researchers to engage in prior research to "formulate more incisive questions about a topic".

I will employ Machi and McEvoy's (2009, p. 5) six-step approach to examine how existing knowledge addresses the research question. This narrative review seeks to synthesise the related literature, explicitly exploring the influencing factors and processes in establishing and operating age-friendly universities (AFUs). Rather than providing an exhaustive critique of AFUs, the review will concentrate on their alignment with this inquiry's specific focus.
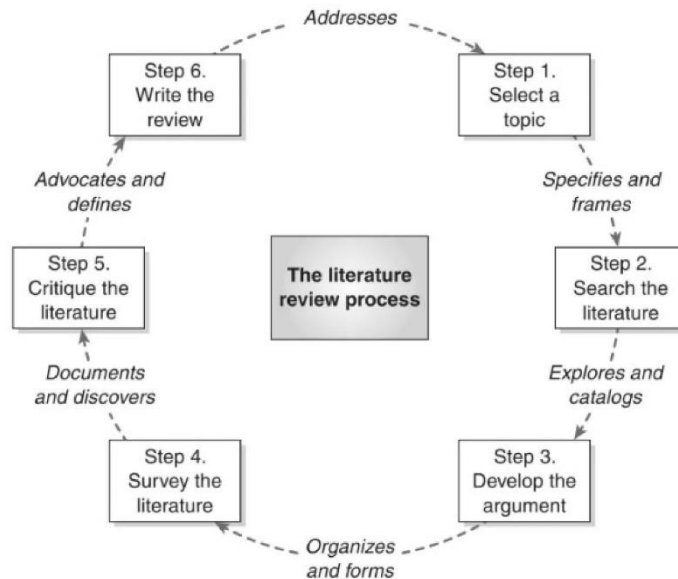
**Figure 3.1 The Literature Review Model (Machi and McEvoy, 2009, p. 13)**

These steps inform the overall plan of the current review, moving from generality to specificity to bring a focus and perspective to the study.

## 3.2 The origin and evolution of Age-Friendly

The term "age-friendly" has become ubiquitous in the field of ageing (Glicksman and Ring, 2017). However, to understand the origin of the term and its development, it is necessary to review the corpus of literature and other terms that have influenced the evolution of the age-friendly movement. The terms "active ageing," "successful ageing," "healthy ageing," and "positive ageing" are often used interchangeably with age-friendly (Menassa et al., 2023). Mendoza-Ruvalcaba and Fernandez-Ballesteros (2016) found no universally accepted definition for these terms despite their potential synonymity with "age-friendly." These terms share overlapping and similar elements and have been accepted in gerontology as a new paradigm representing biomedical (Fries, 1989) and psychological perspectives (Baltes & Baltes, 1990) of ageing. Each term contributes a slightly different element to the ageing discourse, which is explored below. Age-friendly initiatives translate these concepts into practical implementation, embodying the paradigm they represent.

Age-Friendly has its genesis in the Vienna International Plan of Action on Ageing (UN, 1983, p. 14), which made recommendations on a healthy diet, health care, and housing and actively promoted engagement of older people:

> …policies and programmes were necessary to respond to the specific needs and constraints of the elderly. Several useful recommendations were made in the draft Plan for measures in health, housing and the environment, family, social welfare, income security and employment, and education. The draft Plan identified certain areas for cooperation in research and the exchange of information and experience at the international level. It stressed the need for education of the general public about the ageing process and the ageing themselves.

The plan further idealised that the generally expanding lifespan of individuals worldwide would be accompanied by efforts to fill those extra years with a sense of purpose and accomplishment. Older people would not be relegated to a marginal and passive role.

Subsequently, the 2002 Madrid International Plan of Action on Ageing (UN, 2002) focussed on three priority areas: older persons and development, advancing health and well-being into old age, and ensuring enabling and supportive environments. The UN endorsed this, intending to embed this in emerging policy development on ageing.

The WHO followed the Active Ageing Policy Framework (2002) by defining eight domains impacting citizens' ages. From the outset, including older people in the dialogue was essential for developing policy. Ensuring their inclusion and full access to urban spaces, structure, and services informed the policy framework by maximising their expertise and potential for continued human development (Plouffe & Kalache, 2010). The domains were identified through a consultation process with older people, as they are best placed to say how a city can become a better place for its ageing population. The domains included outdoor spaces and buildings, transportation, housing, social participation, respect and social inclusion, civic participation and employment, communication and information, and community support and health services. The domains provide local and regional authorities with a framework to identify end-user needs in each domain. They are an essential conduit to ensure that older people's voices are incorporated into planning and decision-making.

An additional benefit to the age-friendly city design is the possibility of adapting cities and harnessing their natural and built environment for residents of all ages and capacities. An age-friendly community is barrier-free, designed for diversity, inclusion and cohesion

(Bruce *et al.*, 2014). Age-friendly settings enable people to stay active and connected and contribute to their community's economic, social, and cultural lives (United Nations, 2007).  Becoming age-friendly can make a city of choice for all generations (WHO, 2020). Scott Ball, an Urban Planner, expressed a universal view that a society suited to older people's needs is suitable for all (Vitalpictures, 2012).

Evaluating how age-friendly a community is was addressed by the Vancouver Protocol (WHO, 2007), a research protocol to guide groups working with older people to collect local information and pinpoint a community's specific advantages, assets and weak spots. Furthermore, community members' active participation in evaluating their community elicited support and engagement. Persons involved in the age-friendly community research process could also suggest changes, implementation and mechanisms to monitor improvements. While the Vancouver Protocol and its accompanying checklist have served as foundational tools for municipalities, states/provinces, and countries in creating age-friendly initiatives and the World Health Organization's (WHO) approach has been adapted and refined over time, it has faced critical scrutiny. Critics argue that it promotes a rigid, idealised model of age-friendliness, which lacks sensitivity to the diverse needs of older people and communities, is overly inclusive, and potentially hinders the active participation of older people in community development.  Plouffe et al. (2016) examined the implementation of the Vancouver Protocol and checklist across North America, South America, Europe, and Australia to evaluate their reception and application and how local initiatives addressed these criticisms. Adaptations included refining the original dimensions to emphasise informal social support, safety, and security. The checklist has been variably employed, typically alongside a consultation process. Respecting diversity and ensuring engagement have been central to many, though not all, initiatives. Dublin City University adopted an inclusive approach to shaping the Ten Principles from the outset in line with its policy to engage with the community and its mission to transform lives and societies.

## 3.3    Age-Friendly In Ireland

Ageing populations are not homogeneous and should be respected as such. Each country is unique in its demographic portrait, priorities, and infrastructure, which informs governmental policy frameworks (International Federation on Ageing, 2019).

As mentioned previously, the multidimensional aspects posited by scholars confirm that understanding well-being in older people must incorporate environmental, biological, psychological and physiological factors. These factors formed the basis and underlying rationale for Ireland's National Positive Ageing Strategy (NPAS; 2013), which articulated a vision for how Ireland will age and was an instrumental factor in informing the concept and development of the AFU initiative at DCU:

> …. a society for all ages that celebrates and prepares properly for individual and population ageing. It will enable and support all ages and older people to enjoy physical and mental health and well-being to their full potential. It will promote and respect older people's engagement in economic, social, cultural, community and family life and foster better solidarity between generations. It will be a society in which the equality, independence, participation, care, self-fulfilment and dignity of older people are pursued at all times (Department of Health. 2013, p. 3).

The NPAS arose from the Programme for Government's (2011 – 2016) commitment to completing and implementing the strategy. In 2016, the Healthy and Positive Ageing Initiative (HaPAI; Gibney et al., 2018) collaborated with local authorities and Age-Friendly Ireland to research people aged 55 and over. The resulting Local Indicators Report documented the experiences and preferences of older people in Ireland and has been a primary factor in realising the NPAS vision. The report informed service provision, identified gaps, and anticipated support needed by older people to live healthy and independent lives firmly embeds positive ageing as a goal in the Healthy Ireland 2015 – 2025 policy.

The Age-Friendly Cities Programme (AFCP) expanded from an initial pilot of 33 cities, including one in Ireland (Dundalk). It provided a coordinated framework approach that maximised governments' opportunities to plan for their ageing populations coherently and strategically. The Active Ageing Policy Framework called for action on three fronts, defining active ageing to optimise opportunities for participation, health, and security, reflected in the three pillars of Ireland's NPAS.

Population ageing is one of humanity's greatest triumphs and challenges. Countries can afford to meet the rise in demographics if they are prepared to enact policies and programmes to support and enhance health, participation, and security for all older citizens. One of the most effective policy approaches to realising this is adapting the Age-Friendly Cities Programme (AFCP) and the broader concept of age-friendliness (WHO, 2002).

In Ireland, the AFCP was established under a board of directors comprising leaders from industry, social and voluntary services, advocacy organisations, and academia. From the outset, Prof. Brian MacCraith, President of DCU (2010 – 2020), was invested in a vision to explore how a university could become age-friendly. Over time, the AFCP expanded and became embedded in local government with a structure and support to allow local authorities to change perceptions of ageing and the delivery of planning and services. Each age-friendly city or county has an alliance chaired by the champion appointed by the local authority at the local level. Each alliance has a representative from the Older People's Council (OPC) and appointed representatives[3] from the community who meet and consult with the alliance. The alliance also includes representatives from the health and police services, not-for-profit advocacy groups, voluntary and private organisations, and third-level institutions that are more responsive to older people's needs. The Age-Friendly Coordinator represents DCU on the Dublin City and Fingal County Alliances.

Age-friendly cities and communities currently include 1114 cities and communities in 44 countries, covering over 262 million people (WHO, 2020a). In 2019, Ireland became the first country globally recognised by the WHO as age-friendly (O'Brien, 2019).

Stafford's (2018) research raises a critical question about the impact of the age-friendly movement, which seeks to reframe ageing as a cultural phenomenon rather than merely a physical one. This perspective recognises a radical shift in the fundamental understanding of ageing, emphasising that it is not solely about the body or chronological age but also about the environment and relationships. Stafford identifies several key themes that traverse the debate on the efficacy of the age-friendly movement. He argues that for the movement to be effective, it must be grounded in robust theoretical foundations and manifested through creative, participatory, and cultural change. Elaborating on Stafford's points, the age-friendly movement challenges traditional notions of ageing by focusing on how societal structures, community engagement, and interpersonal relationships shape the experience of growing older. This approach shifts the conversation from an individual's physical decline to the broader context in which they age.

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[3] Representatives include local transport and education providers, Garda Siochana, organisations working on behalf of older people's organisations such as Age and Opportunity, Carer's, and local authority officials.

Buffel et al (2024) reviewed age-friendly programmes in 11 cities across the Global North and South, identifying two key themes: changing perceptions of older age and fostering diverse partnerships. These programmes aimed to challenge age-related stereotypes and promote a positive view of ageing through communication campaigns and initiatives that enhance the social participation of older people.  For instance, Guadalajara and Manchester created public sector training courses on the needs of older people, while Brussels, Manchester, and Portland collaborated with universities on ageing research. Intergenerational initiatives were also implemented to foster respect and knowledge exchange between generations.  Despite these efforts, the review highlighted ongoing challenges in changing societal perceptions of ageing. While there was some success in increasing visibility and awareness of older people's needs, combating ageism remains a significant issue affecting the effectiveness of these programmes.

Stafford (2018) also debates that a movement must be rooted in a solid theoretical framework to genuinely transform perceptions and experiences of ageing. This includes integrating insights from various disciplines, such as sociology, gerontology, and cultural studies. By doing so, the movement can address the multifaceted nature of ageing and propose comprehensive solutions.  Furthermore, Stafford emphasises the importance of creative and participatory methods in advancing the age-friendly agenda. These methods involve older people designing and implementing policies and programs, ensuring their voices and experiences are central to the movement. Cultural change is also crucial, as it requires challenging and changing societal attitudes towards ageing, promoting inclusivity, and fostering intergenerational solidarity, which are discussed further below. In summary, Stafford's research highlights the need for the age-friendly movement to evolve beyond superficial changes. It must be deeply theoretical, creatively implemented, and culturally transformative to effectively reposition ageing as a positive, inclusive, and dynamic aspect of society.

Stafford's approach offers a critical lens through which to evaluate the Ten Principles of an Age-Friendly University (AFU). His emphasis on theoretical grounding, creative and participatory methods, and cultural transformation affects these principles in several ways which are listed below:

31

**Table 3.1. A Critique of Ten Principles of an Age-Friendly University**

| Principle | Critique |
|---|---|
| Encouraging the participation of older people in core activities | While the principle encourages participation, Stafford's approach would argue for deeper integration. Instead of merely including older people in activities, universities should involve them in the planning and decision-making, ensuring their voices shape the core activities. |
| Promoting personal and career development in the second half of life | Stafford's perspective highlights the need for educational and career development programs that reflect the cultural and relational aspects of ageing. Universities might focus too narrowly on skill acquisition without considering the broader context of older people's lives, including their previous experiences and current relationships.. |
| Increasing understanding of ageing and intergenerational issues | This principle could benefit from Stafford's call for a more comprehensive exploration of ageing. Universities should incorporate interdisciplinary studies that address the cultural, social, and relational dimensions of ageing rather than focusing primarily on biological and chronological aspects. |
| Engaging actively with the university's retired community | According to Stafford's approach, universities must shift from merely engaging retired individuals to fully integrating their insights and contributions. This would mean creating roles for retirees that leverage their experience and foster meaningful engagement within the university community. |
| Promoting intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages | While this principle aligns with Stafford's emphasis on relationships, there may be a need for more structured and intentional programs that facilitate intergenerational learning. Universities should ensure these programs are designed to foster genuine collaboration and mutual respect. |
| Widening access to online educational opportunities for older adults | Stafford's approach suggests that universities must go beyond just providing access. They should ensure that online offerings are culturally relevant and designed to engage older people meaningfully, considering their diverse backgrounds and learning preferences. |
| Creating opportunities for older people to participate in research projects | Stafford's approach suggests that participation should be more collaborative. Older people should be involved at every research stage, from conception to dissemination, ensuring their perspectives and experiences shape the research outcomes. |
| Increasing the understanding of the impact of an ageing demographic on society | This principle could be expanded to reflect Stafford's broader view of ageing. Universities should explore the multifaceted impacts of an ageing demographic, including cultural, economic, and social dimensions, and use this understanding to inform policy and practice. |
| Promoting an age-friendly culture throughout the university | Stafford's call for cultural transformation implies that promoting an age-friendly culture should be a fundamental and pervasive effort. This means challenging ageist attitudes and practices at every level of the university, fostering a culture of inclusion and respect for older people. |
| Ensuring regular dialogue with organisations representing the interests of the ageing population | Stafford's emphasis on participatory methods implies that dialogue should be more than regular—it should be continuous and deeply integrated into university decision-making processes. Universities should seek not just feedback but active partnerships with these organisations. |

Stafford's approach contributes to a critique of the current implementation of the Ten Principles of an Age-Friendly University by applying deeper, more meaningful engagement with the cultural and relational aspects of ageing. This critique suggests that universities must move beyond surface-level inclusivity and adopt strategies that fully integrate older people into university life, respecting and leveraging their unique contributions and perspectives.

Golant's (2014) research raises concerns about the development and future of the age-friendly movement, asking, "Are we expecting too much?" Undoubtedly, age-friendly initiatives aim to improve older people's material and social environments; enabling them to age successfully is good policy. However, with limited funding and competing demands, proponents must make a stronger case for these programs. Advocates must differentiate their mission from other housing, planning, service, and care programs that aim to improve older people's well-being. They need to show that their programs offer unique solutions that do not overlap with other community-based efforts, warranting separate funding and recognition. Critics (Buffel *et al.*, 2020) argue that age-friendly initiatives are overly ambitious and attempt to address a wide range of issues, from improving walkability to providing affordable housing and home-based support services. These programmes should narrow their focus to avoid the criticism of trying to do too much. They might consider targeting healthier, more active older people to keep them engaged in their communities rather than trying to support the frailest individuals to remain independent.

Additionally, they should serve the large segment of older people with moderate incomes who often fall outside the current safety net and cannot afford private sector options. Proponents must also address concerns about these initiatives' sustainability and leadership-driven nature. They need to provide evidence that programs are meeting the actual needs of older people and demonstrate what will happen when funding ends.

Most importantly, more evidence-based research is needed to assess the effectiveness of these programs. It includes resident-level data on physical and psychological well-being improvements and community-based data on social, health, and fiscal benefits realised by local and state governments. Investing in community-based solutions can significantly benefit older people. Still, proponents must tackle these issues to argue convincingly for long-term funding, allowing more older people to age in place happily and healthily.

## 3.4 Language and Culture

Before advancing the reviews of the literature surrounding the concept of age-friendly, it is essential to note the significance of language and culture to the dialogue on ageing. Language is a means of communicating values, beliefs, and customs; it has an important

social function as it fosters feelings of group identity and solidarity (Dept of Education, Australia, 2022). There are several aspects and contexts to consider about the language and culture of ageing more broadly. In the context of this research, I wish to address the language used to articulate age-related concepts, ageist language and cultural aspects of ageing as they impact how the Ten Principles are interpreted. By exploring how language shapes perceptions of age-related issues and understanding the cultural nuances surrounding ageing, we can better grasp the implications for implementing and promoting age-friendly initiatives, thus fostering more inclusive and meaningful dialogue on ageing.

Gendron (2016) wrote, "Language carries and conveys meaning which feeds assumptions and judgments that can lead to the development of stereotypes and discrimination." The philosopher Wittgenstein (1922) is credited with the phrase, "The limits of my language mean the limits of my world," implying a perspective that regards truth and meaning as inherent in language, signs, and codes, suggesting that these "mediums" encompass the boundaries of human expression and consequently, human comprehension. Buda (2023) recounts how, in her native Hungary, the phrase "a nation lives in its language" demonstrates that words and phrases will keep evolving and adjusting to ever-changing circumstances. Despite this, a thread of logic and tone is present, unique to the language's native speakers. The language reflects what is prominent in the speakers' minds, expanding to convey the most commonly expressed meanings.

Kroskrity (2010) emphasises how language ideologies shape social identities and discusses future research trends like deconstructing linguistic discrimination and analysing professional language ideologies. He also stresses the importance of understanding language ideologies in the context of globalisation, evolving language communities, their impact on inequality, and power dynamics in various cultural contexts. This is particularly relevant in the context of the term "age-friendly." Kramsch (2014) reiterates this perspective, focusing on the intricate relationship between language and culture within applied linguistics and explores aspects of how cultural meaning is encoded in linguistic signs, how cultural meaning is expressed pragmatically through verbal action, how culture is co-constructed by participants in spoken interaction, and how language and culture are affected by language technologies. The Ten Principles of an Age-Friendly University are generic by design; the language of the Principles promotes inclusivity and diversity by emphasising the importance of understanding diversity and the impact of language on thought and communication and aligns with creating an inclusive and diverse environment

within an AFU. It is also a vehicle to accommodate cultural meaning and a way for AFUGN members to co-construct culture through discourse relevant to fostering effective communication and interaction within an AFU.

However, while inclusive and broad, the generic aspect of the Ten Principles poses several disadvantages.

- **Lack of Specificity**:
   The principles' broad and vague terms can lead to varied interpretations, resulting in inconsistent implementation across different institutions. Without clear guidelines, universities might struggle to translate these principles into concrete actions.

- **Difficulty in Measurement**:
   Generic language makes developing specific metrics for assessing progress challenging. Universities may find it hard to evaluate the effectiveness of their age-friendly initiatives and demonstrate tangible outcomes.

- **Limited Accountability**:
   The broad nature of the principles can lead to a lack of accountability. If the principles are not clearly defined, it becomes easier for institutions to claim adherence without making significant changes or investments.

- **Overlooking Unique Needs**:
   Generic language may fail to address the unique needs and circumstances of different universities and their older populations. Tailored approaches are often necessary to effectively support diverse groups of older people.

- **Risk of Superficial Adoption**:
   Universities might adopt the principles superficially, focusing on symbolic gestures rather than meaningful changes. Without specific requirements, initiatives could be more about appearance than substance.

- **Challenges in Stakeholder Engagement**: Vague language can make it difficult to engage stakeholders meaningfully. Clear and specific language is needed to

effectively communicate goals, expectations, and roles to faculty, staff, students, and community partners.

- **Hindering Policy Development**:
  Policymakers may find developing and implementing policies based on generic principles challenging. Specific, actionable guidelines are essential for creating effective age-friendly policies and practices.

- **Inadequate Resource Allocation**:
  Universities might struggle to allocate resources appropriately without precise language. Specific principles can help ensure that funding and efforts are directed toward impactful age-friendly initiatives.

Price (2022) said in an address to the House of Lords in the UK that "the current and persistent narrative around ageing goes far beyond what is deeply embedded within culture and behaviours. Meaningful change will not be immediate, but attitudes can be changed if we as a society start getting the language we use around ageing – and when talking about older people – right."

Such ageist language is often subtle and not instantly recognisable as it is couched in benevolence and frequently well-intentioned (Epstein et al., 2023). Language reflects power inequalities and normalises discrimination as it converts practice to everyday discourse (Ng, 2007). Even within academic discourse, the terms used to refer to older people are ageist, as the predominant use of the term "elderly" implies "othering" of older people (Avers et al., 2011; Murphy et al., 2022). Similarly, the assumption of the existence of a universal understanding of a phrase or term can be problematic, as the power of language emerges in the close association between power and knowledge, in which the ability to define what is real generates the realm of future possibilities (Farquhar & Fitzsimons, 2011). This notion is exemplified by the interpretation of the term "age-friendly," commonly employed to characterise systems and environments tailored to the needs of older people (Dash et al., 2022). Dunning et al. (2023) research concurred with the belief that "age-friendly" is more commonly associated with cities and communities. Their research indicated that this broad application lacked depth and specificity, leading to interpretations extending beyond some initiatives' intended scope. However, the clarity of this phrase is not universal across all languages (Kalache, 2020). While it effectively

encapsulates the concept in some linguistic contexts, its meaning may not immediately resonate in others. Chivers's (2022) research challenges readers to rethink the metaphors and narratives around population ageing. Terms like "silver tsunami" or "ageing crisis" imply urgency and fear, framing the issue as a disaster rather than a natural demographic trend. By unpacking these "panicked" metaphors, she aims to foster a more balanced and nuanced understanding of the demographic changes, advocating for a shift in how society views and talks about ageing. Instead of focusing solely on the challenges, it may encourage recognising the contributions and potential of older people and highlighting both challenges and opportunities. Linguistic variability underscores the importance of culturally sensitive and linguistically appropriate communication when addressing issues related to ageing and age-friendly initiatives. The language of ageing and its broader concepts are understood by those working in the ageing sector; however, the importance of cultural factors to the institution and the community it serves in building a framework for analysing and understanding cultural constructions of ageing is not well-developed and has a wide range of implications. (Vidovićová, 2018; Von Hülsen-Esch, 2021). It is further elaborated in Chapter 6.

### 3.4.1 Active Ageing

The World Health Organization (WHO) initially defined active ageing in 2002 as the process of optimising opportunities for health, participation, and security to enhance the quality of life as people age. Later, the WHO included lifelong learning as a critical component, emphasising the need for continuous education to update knowledge and skills, thereby ensuring personal security and relevance in society. Lifelong learning encompasses both formal and informal education and is essential for active ageing, as it facilitates access to information, according to Myler, Lovejoy, and Swan (2022).

Active ageing lacks a universally agreed-upon definition or intervention program and is primarily seen as a European policy term. It is often framed from an economic and productive perspective, serving as a basis for European policy development. The concept also emphasises the importance of physical activity for older people, promoting the idea that such activities enrich lives, support independent and healthy lifestyles, and encourage volunteerism and community engagement. Mendoza-Ruvalcaba and Fernández-Ballesteros (2016) concluded that active ageing, in all its forms, enhances the quality of life by maximising human potential.

Flores et al. (2019) described active ageing as a comprehensive process that optimises opportunities to enhance physical, social, and mental well-being throughout the life cycle, extending healthy life expectancy. Their systematic review identified various criteria for active ageing, including physiological state, well-being, social life, personal resources, and the environment.

Timonen (2016) highlighted a paradox within the concept of active ageing. On the one hand, it encourages older people to be active and in control of their lives, but on the other hand, it often portrays them as lacking agency. This paradox is compounded by marketers, researchers, and policymakers' tendency to treat older people as a homogeneous group, ignoring differences in gender, sexual orientation, and ethnicity. This approach supports the flawed belief that a single-age model can be universally applied.

However, Buffel et al. (2020) criticised the broad generalisations of the term "active ageing." They pointed out that while some cities promoted initiatives like "Walk and Talk" to address social inclusion, there was no substantial evidence to support their effectiveness. This critique underscores the need for more specific, evidence-based approaches to promoting active ageing.

### 3.4.2   Successful Ageing

Butler (1974, p. 534) first introduced the term "successful ageing," aiming to shift society towards a more balanced perception of older individuals. Initially focused on physical health, subsequent research distinguished ageing from illness, suggesting that with the right conditions, people can age without disease (Rowe & Kahn, 1987). However, a study of centenarians by Motta et al. (2005) challenged Rowe and Kahn's conclusions, asserting that successful ageing encompasses social and productive activities, autonomy, cognitive health, and the absence of debilitating chronic diseases.

Annele et al. (2019, p. 359) expanded on the concept, defining successful ageing as a "multidimensional concept with the main focus on expanding functional years in a later life span." This multidimensional approach includes physical, functional, social, and

psychological health domains. On a population level, it involves promoting health and participation to inform policies to improve health outcomes.

Timonen (2016) critiqued the commercialisation of successful ageing, aligning with Katz and Marshall's (2003) observation that products like Viagra and other rejuvenating treatments are often marketed to create new consumer groups. Timonen further argued that successful ageing is framed within economic and productivity perspectives, shaping European and global policy development. Policies promoting prolonged working life and combating age discrimination often overlook the individual needs of older people, catering only to a small segment of "model citizens" who fit the mould of successful ageing.

Individually, successful ageing is defined by health outcomes, physical and cognitive functions, and engagement in various life activities. Initially rooted in a biomedical perspective, the concept has evolved to include social and psychological adjustments in later life. This transition reflects a holistic approach that emphasises the subjective dimensions of the ageing process (Annele, Satu, and Timo, 2019). Despite this evolution, there is still a need for a universally accepted and scientifically supported definition of successful ageing.

Timonen's model is not unique in highlighting the limitations of the successful ageing concept. She proposes ten postulates that combine policy ideas, commercial depictions, and academic conceptualisations of model ageing. It underscores the complexity and the need for a more comprehensive and inclusive understanding of what it means to age successfully.

Figure 3.2 below illustrates the dimensions of successful ageing, showing the combination of biomedical and psychosocial factors that contribute to ageing well and encompass healthy, active, and productive ageing.
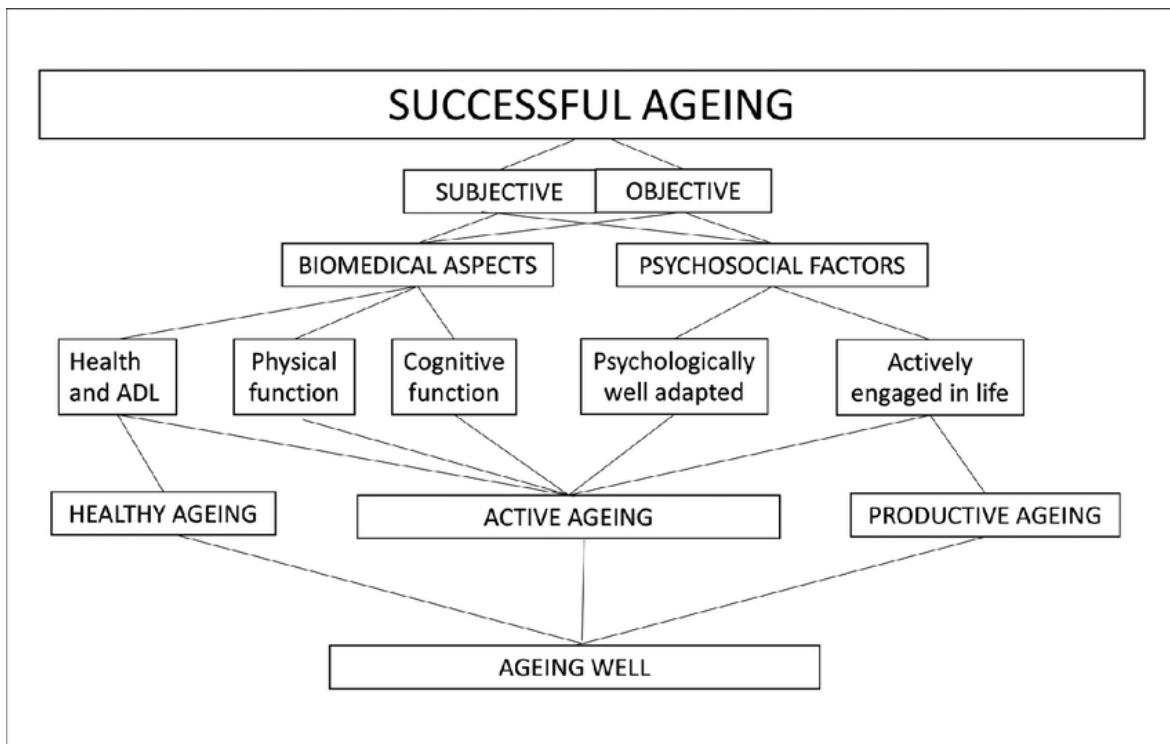
**Figure 3.2. The dimensions of successful ageing (Annele et al., 2019, p. 360)**

The interpretation of these terms varies across continents. In the United States, active ageing involves societal, organisational, and individual actions to extend working life. In contrast, the European Union adopts a broader policy framework that emphasises the social and holistic aspects of ageing. Timonen (2016, p. 94) argues that certain actors are interested in classifying population ages for capitalist gains, and her model ageing theory suggests that there will be "increasing exhortations on older people to adapt and change their behaviour," which could negatively impact disadvantaged groups.

Foster and Walker advocate for a comprehensive life-course approach based on a partnership between citizens and society. They believe this model could provide a robust framework to inform national and global population ageing strategies, addressing the complexities and diverse needs of ageing populations. Foster and Walker argue that a comprehensive life-course approach based on a partnership between citizens and society is the best model and could provide a framework to inform national and global population ageing strategies.

### 3.4.3   *Healthy Ageing*

The Healthy and Active Ageing report (EuroHealthNet, 2012) defines healthy ageing as enabling older people to enjoy a good quality of life through holistic approaches addressing physical and mental health, improving social determinants of health, and ensuring safe living environments. It calls for a flexible pension system, related retirement policies, and a long-range, lifelong perspective beginning in childhood. The report emphasises that healthy ageing requires various societal and individual actions and a structural paradigm shift where older people maintain active societal roles.

However, critiques of "healthy ageing" often highlight its narrow focus and implications for societal expectations, policy, and health practices (Lamb, 2014). Critics argue that it prioritises physical health over mental, social, and emotional well-being, leading to an oversimplified, medicalised view of ageing  (Oxley, 2009). It can set unrealistic, homogeneous standards, neglecting diverse experiences shaped by genetics, socio-economic status, environment, and personal history. On a societal level, this focus may skew resources towards prevention and health maintenance, overlooking those needing chronic care. It can pressure policymakers to create unsuitable interventions and stigmatise individuals not meeting "healthy ageing" criteria, impacting self-esteem and social inclusion.

Beard et al. (2016) discuss the impact of ageing disorders and multimorbidity on ageing, noting that attitudes towards ageing influence self-perception of health, while multimorbidity affects functioning, quality of life, and mortality risk. Increased healthcare use and costs result from the dynamics between multimorbidity, physiological change, and chronic diseases like diabetes, dementia, and osteoarthritis. Beard identifies four action areas: aligning health systems to older populations, developing long-term care systems, fostering age-friendly environments, and improving monitoring and understanding.

Ethically, "healthy ageing" might benefit those with better access to resources, exacerbating health inequities and undermining older peoples' autonomy by promoting societal ideals over personal preferences. It can reinforce ageist attitudes by overly valuing youth-like health. While aiming to promote well-being, critiques emphasise the need for a nuanced, inclusive understanding of ageing that respects its complexity and diversity.

The WHO Global Network of Age-Friendly Cities and Communities, covering over 113 million people globally (WHO, 2015), offers opportunities to implement these changes widely. This is regarded as a sound societal investment, allowing older people to live longer, healthier lives.

### 3.4.4 Positive Ageing

Emerging policies on healthy ageing have ignited a discourse promoting positive attitudes towards ageing, encouraging acceptance, recognition, and respect for dynamic and altering life phases (WHO, 2002). Positive ageing is defined as an adaptive process where biological, lifestyle and environmental factors interact over time to produce long-term positive outcomes in older age (Strawbridge et al., 2003). Killen and Macaskill (2020) suggest that coping behaviours and physical ability also play a part. Policies promoting older people's well-being and encouraging active participation in society via social interactions that support older people to remain in the community for as long as possible make economic and social sense (Lui et al., 2009). Ballesteros (2011) supports a multidimensional aspect to positive ageing and suggests it can be summarised by assuming three factors: ageing is a complex phenomenon dealing with change across the lifespan, which is individual in level, rate and direction; the capacity of an individual to adapt and modify behaviours across the lifespan can contribute to an ability to optimise their biological, behavioural and social resources as they age and compensate for their deficits in older age; and the variability in how one's age is subjective and negative social images can impact on how one's ageing process is perceived. Ballesteros argues that reducing negative aspects and focusing on positive facets of ageing will lead to better outcomes for individuals and society (Ballesteros & Pinquart, 2011). However, while age-friendly activities have become a central focus of policies aimed at improving the lives of older people, there is limited knowledge about the effectiveness of the age-friendly model in reducing social exclusion in later life—a benefit that these activities are claimed to provide (Buffel *et al.*, 2020). Buffel (Ibid) critically argue that there is a limited understanding of age-friendly programmes' effectiveness in reducing old-age exclusion. They question the value of investing in programmes to enhance the inclusion of older people, suggesting that the existing evidence does not convincingly demonstrate their impact. The lack of robust data exacerbates this issue, as it hinders the ability to assess the global effectiveness and scalability of age-friendly frameworks. Without comprehensive and reliable data,

evaluating whether these initiatives can be successfully adapted and implemented in diverse contexts to improve older people's lives is challenging. It calls for more rigorous research and evaluation to determine age-friendly programs' actual benefits and potential. It ensures that resources are effectively utilised to address the needs of ageing populations worldwide. They also found that some countries mention exclusion but do not elaborate on its forms, while others address exclusion by focusing on reducing isolation and promoting community participation.

### 3.4.5 Critical Perspective of the Language of Ageing

Hillgaard Bulow and Soderqvist's (2014) research into the critical aspects of successful ageing draws on numerous research findings and scholarly contributions. It provides a comprehensive picture by synthesising numerous elements contributing to understanding and promoting successful ageing.

It begins with a historical overview, highlighting the pioneering work of Rowe and Kahn in the late 1980s, whose research laid the foundation for understanding successful ageing by differentiating between usual and successful ageing. They emphasised key factors such as the absence of disease, high cognitive and physical functioning, and active engagement with life.  Interdisciplinary collaboration emerges as a significant theme in the research, underscoring how successful ageing research benefits from the combined efforts of gerontology, psychology, sociology, and public health experts. This collaboration enriches the understanding of ageing by integrating diverse perspectives and methodologies.

Another critical aspect discussed is the life course perspective. This approach highlights the continuous nature of ageing, focusing on maintaining physical, cognitive, social, and emotional functioning throughout an individual's life. It advocates for strategies that support individuals at every stage of their lives, emphasising that successful ageing is a lifelong process. It also emphasises the importance of distinguishing between biological and chronological age. Understanding the difference between an individual's physiological state and their actual age in years helps to appreciate the variability in ageing processes among individuals.  Addressing structural inequalities and societal perceptions of ageing is another crucial element. Hilliard Bulow and Soderqvist critique disparities in healthcare, socioeconomic status, and access to resources while challenging societal stereotypes about

ageing. It advocates for a more inclusive view that recognises the diverse experiences of older adults.  While individual empowerment and adaptation are essential for successful ageing, they encourage older people to adapt to changes and engage in lifelong learning, promoting autonomy and self-efficacy.  It is crucial to recognise the complexity and heterogeneity among older people. Successful ageing is not a one-size-fits-all concept; it varies significantly based on individual experiences, backgrounds, and health conditions.

The psychological aspects of successful ageing are also explored. Adaptation, self-acceptance, and social engagement are vital for maintaining mental health and overall well-being in later life.  Ontological discussions explore the interactions between social factors and biological processes in ageing. This holistic view acknowledges the complex interplay of various influences on the ageing process.

The political implications of successful ageing highlight the importance of autonomy, independence, and health-promoting practices. Policies that support these aspects can enhance the quality of life for older people and promote societal well-being.  In concurrence with Timonen's (2016) research, the authors reflect on the complexity and entanglement of the concept of successful ageing and recognise that complexity, rooted in differences in values and ontologies, underscores the diverse ways ageing is experienced and understood across cultures and individuals.

From an age-friendly perspective, it is essential to acknowledge the emerging themes and publications accompanying the growth of the age-friendly movement. Recognizing the complexity of these themes is crucial, as it reflects the intricate nature of ageing and ageing research. This complexity is especially evident when engaging with conceptual frameworks such as "successful ageing."

## 3.5    The Emergence of Age-Friendly Eco-systems

While the world's population increases (85-year-olds are the fastest-growing segment of older people (OECD, 2020)), social inequalities exist that have not impacted all people equally, thereby hampering the revolution in longevity. Since the launch of the AFCP, age-friendly concepts have expanded. Fulmer et al. (2020, p. 1936) cite the need to focus on the broader development of age-friendly ecosystems as communities or cities are only one

element of age-friendly consideration. A synthesis of age-friendly policy programmes includes age-friendly health systems, public health, states, cities, and universities.



**Figure 3.3. Illustrates an age-friendly eco-system: a synthesis of age-friendly programmes (Fulmer *et al.,* (2020, p. 1937)**

In December 2020, the John A Hartford Foundation, Age-Friendly Foundation and International Longevity Centre, Brazil, convened an inaugural meeting of 40 recognised leaders working to advance age-friendly initiatives in public health, health systems, community academia, and employment. The discussion focused on their shared work characteristics and measures to inform an age-friendly ecosystem.

 The group aims to describe a broad and actionable strategy to improve older people' quality of life. Using a systems-based approach that reaches across initiatives to deliver impact, the group chose the social-ecological model posited by McLeroy (McLeroy et al., 1988) because it acknowledged the connections and interplay between older people and their environments. McLeroy developed a five-level model to help understand and organise the factors that affect older people' health and well-being.

**Figure 3.4. "An Ecological Perspective on Health Promotion Programmes" (McLeroy *et al..*, 1988)**

The group has defined an age-friendly ecosystem as a dynamic group of independent, interconnected players that create products, programmes, and services that constitute a coherent approach or solution to a challenge or opportunity. Building on the work of McLeroy (Ibid) and examining a range of programmes, the group have examined a cross-walk analysis to create a visualised analysis of "Shared Characteristics of Age-Friendly Frameworks", reflecting Fulmer's synthesised framework above.

This emerging work initiated in late 2020 is ongoing and extends the age-friendly narrative beyond the Age-Friendly Cities Programme. While this is interesting and innovative, it is not the focus of this study. However, it presents a segue into examining universities' roles and, more importantly, how they engage with ageing.

## 3.6     What is the purpose of a University?

The documentation further explored (Chapter 4, Findings) case studies and document analysis, which refer to reoccurring questions from institutions concerning the concept of the AFU and how to interpret the Ten Principles, giving rise to debate and discussion about the function and nature of universities. The term "university" finds its origin in legal Latin *universitas*, meaning community, and in classical Latin *universus*, representing "totality" (Neave, 2000).  The concept of the university originated with Plato's Academy, which marked the beginning of academic institutions. Plato's educational, political, cultural, and philosophical concerns led him to believe that formal and informal education was essential

for producing virtuous citizens (Trelawny-Cassity, 2021). Today, universities are complex institutions that advance knowledge, foster personal and professional growth, preserve culture, engage with communities, promote economic development, ensure social mobility, and influence global collaboration. They are crucial for societies' intellectual, cultural, and economic vitality.

John Henry Newman's (1905) publication, *The Idea of a University*, described the university as a community of thinkers engaging in intellectual pursuits for their own sake, teaching students to "think and to reason and to compare and to discriminate and to analyse" (p. 112). Newman, writing at a time when only the elite benefited from higher education, did not address the need to balance the pursuit of knowledge for its own sake with imparting transversal skills. Instead, he argued that the university's primary role was to provide students with "perfection of intellect... the clear, calm accurate vision and comprehension of all things" to allow individuals to make sound judgments (Ker, 2011).

At the core of every university is a complex interplay between promoting advantage and perpetuating disadvantage, subtly shaping the social order. This dynamic reveals higher education's power and limitations (Ball, 2012). Many students from low-income backgrounds face significant challenges in accessing higher education, often starting with standardised tests that, while designed to level the playing field, frequently favour those who can afford extensive test preparation. The high cost of tuition also presents a barrier, and when merit-based aid overshadows need-based support, disadvantaged students are often left out.

Once on campus, the challenges continue. Exclusive social networks reinforce the divide, creating environments where connections and cultural capital are currency. These networks often exclude those who do not fit the mould, leaving them on the outside looking in. A university's culture can be a double-edged sword: fostering a sense of belonging for some while alienating others, especially when cultural insensitivity goes unchecked. Financial aid policies play a pivotal role. Need-based scholarships can be a lifeline, but the debt burden of student loans can stifle future opportunities for those without family financial support. Yet, universities are not merely perpetrators of inequality; they also serve as beacons of hope. They strive to level the playing field through affirmative action and diversity initiatives, giving underrepresented groups a fighting chance. Need-based scholarships and work-study programs can open doors that seemed permanently shut,

while academic support services, like tutoring and mentoring, help disadvantaged students climb higher.

The broader impact of credentialism and cultural capital also deserves consideration. Universities act as gatekeepers to prestigious professions, socialising students into the norms and values of dominant social groups and perpetuating the existing social order. However, this process can also be a force for good. Universities empower students to challenge and change the status quo by promoting critical thinking and a diverse curriculum. (Giroux, 2014).

Community engagement initiatives extend the university's reach beyond its gates. Outreach programs and partnerships with schools in underprivileged areas can spark aspirations and provide pathways to higher education for those who might otherwise be left behind. Inclusive curricula and robust career services help all students, especially those from disadvantaged backgrounds, find their footing in the job market.

In essence, universities are at a crossroads. Depending on their commitment to inclusivity, equity, and justice, they can reinforce existing social structures or act as catalysts for social change. They can mitigate disadvantages and promote a more just and equitable society through intentional policies and practices. This balance holds the promise of transformation for individuals and society alike.

Deboick (2010) suggests that Newman's concept defines a university as nothing geographically or temporally fixed. The mark left on alumni stays with them throughout their lives, reminding us that a university's most significant role shapes the whole individual. This concept is reflected in the Ten Principles of an AFU, which contributes to informing students about the attitude and experience of ageing.

Jenkins (1988) argues that universities did not develop as ivory tower institutions; they were primarily concerned with arts and technologies within a belief and understanding framework. Universities emerged in the pursuit of knowledge and social demands. Jenkins posits that a university aims to survive and maintain detailed teaching and research. He argues that universities need to be responsive to market forces and patrons of research, offering products that are attractive to society's changing needs and of intrinsic value, which concurs with Deboick's assertions.

Miller (2019) reflects that the normative conception of a university is evolving, referring to the differences between medieval universities like Oxford and Bologna and contemporary ones like the Delft University of Technology. Universities have had to adapt to different historical and socio-economic contexts. While past universities often aimed to provide teaching or clerical instruction, contemporary universities focus on emerging professions, constantly prioritising teaching and research in specific disciplines. Miller argues there is an "unresolved theoretical or intellectual problem" (p. 1680) concerning the university's nature and role as an institution, suggesting that a modern university's role is unclear. Some see it as relating to the nation's wealth, while others view it as bringing about a society of equals. Others argue that acquiring knowledge does not specify what areas should be taught or researched (Sperlinger, McLellan, and Pettigrew, 2018). The influence of market-based institutions in the technology sector, which attracts leading university researchers, further complicates this role (Collini, 2012).

Peirce (1966, p. 331) defines a university's function as societal so that "people may receive intellectual guidance and that the theoretical problems which present themselves in the development of civilisations may be resolved." As the founder of American Pragmatism, he argues that a university's role does not need justification in "promoting individual or social welfare" or maintaining the "stability of society".

The benefits of higher education to society are widely documented and linked to improved health outcomes, longer life, empowerment, and happiness. Advanced education and engagement lead to healthier lifestyles, as education informs nutritional and lifestyle choices (OECD, 2013). It also helps develop networking connections, providing support through friendship opportunities (Blieszner and Artale, 2001). This is crucial for young students to develop personal and professional skills as they complete their studies (Bradley University, 2022). Data shows that engaging with higher education promotes robust civic engagement and better social outcomes (Ma et al., 2019; OECD, 2013), and increased knowledge and skills build confidence and self-efficacy (Nietzel, 2019).

Throughout the 19th century, universities played a central role in civic responsibility. Boyer (1996, p. 11) called for universities to reaffirm their historic commitment to the "scholarship of engagement" and become more vigorous in seeking answers to social, civil, economic, and moral problems. He reflected that politicians and self-proclaimed pundits primarily discuss these problems with rarely any academic input, which he regarded as a

loss since the evidence shows that reciprocated discourse and debate enrich a culture's educational health. Boyer concluded that creating a climate where shared academic and civic cultures communicate continuously and creatively will improve the quality of life for all.

In a debate hosted by the Centre for Industry Engagement (Chimaechi, 2018), the panel found that universities had a common relationship with knowledge, comprising a position at the frontier of knowledge, a duty to push knowledge boundaries, the pursuit of knowledge, and the dissemination of knowledge. However, other vital functions, such as driving the economy and research, suggest that universities take on too much. In addition to leading research and innovation, they are expected to run schools, become embedded in their local communities, and be globally connected, indicating a need to differentiate between universities.

Biesta's (2013) research reflects some of the concerns expressed by Chimaechi, exploring what a university is for and what it aims to achieve. Universally, universities want to be at the top of the league tables, be the best, world-class, research-led, and globally cited. Biesta argues that if they are all going in the same direction, they lack a sense of direction and merely react to each other, drifting. She suggests that a university is a historical construction; it reconstructs differently, evolving and emerging in different contexts. Reflecting on comparisons identified by Zgaga (2009) between four archetypes— Napoleonic, Humboldtian, Newmanian, and Deweyan models—which distinguish different conceptions and rationales for universities, Biesta notes that university systems and conceptions are combinations of aspects from each model. She concludes that if the primary role is to teach, it does not simply mean teaching. It also implies rethinking the nature of the university's research and service, regarding the university as a public act with public responsibility. She identifies the process as a need to engage in "(educational) needs definition and (democratic) needs transformation," leading to shared responsibility towards the common good. This raises the critical question of whether contemporary society is open to being taught—a process where one has something to offer and say or remains unchanged without challenge or interruption.

In essence, universities are at a crossroads. Depending on their commitment to inclusivity, equity, and justice, they can reinforce existing social structures or act as catalysts for social change. They can mitigate disadvantages and promote a more just and equitable society

through intentional policies and practices. This balance holds the promise of transformation for individuals and society alike.

The role of an Age-Friendly University extends beyond its immediate academic environment, significantly impacting society through cutting-edge research and technology and promoting and addressing age-related issues through education, research, and community engagement. Their impact in terms of the Age-Friendly Cities Programme is reflected in the Ten Principles by promoting lifelong learning, fostering intergenerational relationships, addressing age-related issues, enhancing community engagement, reducing ageism, improving health and well-being, providing economic benefits, and influencing global practices. By embracing and supporting older people, AFUs contribute to a more inclusive, equitable, and vibrant society. The diverse institutional interests of the AFUGN members reflect many of the views outlined in the literature. Universities have had to adapt to different forms in historical and socio-economic contexts.

The projected decline in students enrolling in higher education is an additional concern arising from (1) **demographic changes** - the "enrollment cliff" predicted around 2025 is due to lower birth rates following the Great Recession of 2008, resulting in fewer college-age students (2) **economic and financial considerations** - rising higher education costs and increasing student debt have led many to question the value of a traditional college degree; (3) **impact of the COVID-19 pandemic** - the pandemic led many students to delay or skip higher education due to economic uncertainty and a shift to online learning. There was also a decline in submissions, especially among low-income and minority students. (4) **shift in educational preferences** - there is increasing interest in vocational training, online courses, and boot camps offering affordable, job-focused programs; for example, companies like Google offer career certificates as alternatives to degrees. (5) **failure to adapt to market trends** - many institutions have been slow to adapt to the changing preferences for more personalised, flexible, and technology-integrated learning experiences and failed to communicate their unique value propositions effectively (Carey, 2022)

These factors contribute to the decline in university attendance, requiring institutions to adapt to remain competitive strategically. The theme that follows ideas on all the concepts of what constitutes a university is its relevance in the community and state by producing

good citizens, knowing how to analyse ideas, pursuing knowledge, and evolving and changing to meet societal needs.

In the context of this research, questions arise about why universities have chosen to embrace the concept of being age-friendly. To address this, I have examined the evidence informing the Ten Principles of an AFU.

## 3.7    Ten Principles of an Age-Friendly University

As the Ten Principles of an AFU evolved, the working group was keen to develop a generic framework that could be easily interpreted, adapted and implemented. The group recognised the need for a multidisciplinary approach (Colgan, 2012). The Ten Principles encompass participation, personal and career development, educational needs, intergenerational learning, longevity dividend, online education, research, retirees, health, wellness, arts and culture, and consistent engagement with organisations representing older people. However, there are common elements that overlap among the Principles.

## 3.8    The Ten Principles and Education Policy

Under the Higher Education Authority Act of 1971, the Higher Education Authority (HEA; Higher Education Authority, 2018) has several tasks: (1) furthering the development and assisting in the coordination of state investment in higher education; (2) promoting an appreciation of the value of higher education and research; and (3) the attainment of equality of opportunity and the democratisation of the structure of higher education. Furthermore, in a policy context, the stability of higher education is critical to the success of government policies and influences Ireland's development economically, culturally and societally. Therefore, the plan recognises the need for solid autonomous institutions and the necessity of linking accountability with autonomy through performance compacts and dialogue. The table below illustrates how the Ten Principles are reflected throughout the HEA plan:

**Table 3.2. Ten Principles of an Age-Friendly University and the HEA Strategic Plan**

| Ten Principles of an Age-Friendly University | HEA Strategies |
|---|---|
| 1. **To encourage the participation of older people in all the core activities of the university, including educational and research programmes.** | The policy direction of the HEA will significantly improve the equality of opportunity through education and training and recruit a student body that reflects the diversity and social mix of Ireland's population. |
| 2. **To promote personal and career development in the second half of life and support those who wish to pursue "second careers."** | HEA will support the institutions to address identified skills needs through the mainstream provision and targeted upskilling initiatives (like Springboard+ and apprenticeships), leading to enhanced graduate employability. Enterprise needs to be reflected in relevant initiatives. |
| 3. **To recognise the range of educational needs of older adults (from those who were early school-leavers through to those who wish to pursue Master's or PhD qualifications).** | The National Skills Strategy identifies critical future skills needs, including ICT, languages, entrepreneurship and core transversal skills like communications, innovation and critical thinking. |

| Ten Principles of an Age-Friendly University | HEA Strategies |
|---|---|
| 4. To promote intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages. | Ireland's lifelong learning levels will improve as the higher education student profile reflects our evolving learning requirements and opportunities. |
| 5. To widen access to online educational opportunities for older adults to ensure a diversity of routes to participation. | The student will, of course, remain at the heart of future developments. Who that student is will change, with a shift towards more significant numbers participating in lifelong learning, regardless of whether they are working.<br><br>The HEA – internally and externally – is guided in its activities by the following principles: Consultative and engaged; Open and effective in the pursuit of continuous improvement; Fair and objective; Equality and inclusion; Accountable and transparent; »Evidence-based and results-driven; and Respectful of institutional autonomy – while holding institutions to account for high performance.<br><br>The reach of higher education back into the more comprehensive education system will be further developed through continuing work on the transition reform plan. |
| 6. Varied older adults. | Higher education in Ireland also serves as the locus for public research, supporting research that tackles societal issues like equality of opportunity and an ageing population.<br><br>Ireland has the highest proportion of young people in the EU and an ageing population. |

| Ten Principles of an Age-Friendly University | HEA Strategies |
|---|---|
| | In the HEA's overarching interests and needs pursuit of the best possible student experience and public research system for Ireland, the HEA – internally and externally – is guided in its activities by the following principle: Evidence-based and results-driven.<br><br>Digital Transformation<br><br>The digital transformation of Irish higher education can – for the better – change dramatically: How it is delivered (e.g., through online options and in a range of flexible ways); and How it is delivered to widen its reach to more and less traditional higher education students. Such a transformation will render the system's service to Ireland (and globally) more impactful and more equitably accessible.<br><br>PATH funds deliver additionality concerning access participation and completion. |
| **7. To increase the understanding of students of the longevity dividend and the increasing complexity and richness that ageing brings to our society.** | We must play to our national strengths and identify our optimal positioning in a fast-changing world.<br><br>HEA wants to significantly improve the equality of opportunity through education and training and recruit a student body that reflects the diversity and social mix of Ireland's population.<br><br>Support the development of a well-balanced higher education research system, particularly the development of people.<br><br>Ireland's lifelong learning levels will also improve as the Irish higher education student profile reflects our evolving learning requirements and opportunities. |

| Ten Principles of an Age-Friendly University | HEA Strategies |
|---|---|
| 8. To enhance access for older adults to the university's range of health and wellness programmes and its arts and cultural activities. | Institutions will adopt a holistic approach to internationalisation, using it as a strategy for quality enhancement, among other things: the student learning experience at the host institution; interculturalism and the curriculum; the nature of the services and support provided; and recognition of learning outcomes.<br><br>Equity of Access - learning modes will also support the equity of access objective. |
| 9. To engage actively with the university's retired community. | A stable, sustainable higher education system is key to tackling challenges and forging exciting new opportunities for Ireland.<br><br>The HEA – internally and externally – is guided in its activities by the following principles: Consultative and engaged. |
| 10. To ensure regular dialogue with organisations representing the interests of the ageing population. | Active strategic bilateral engagement with relevant agencies and representative bodies. |

The HEA plan supports the Action Plan for Education (Department of Further and Higher Education, Research, Innovation and Science, 2019). It provides a framework to indicate that the best fiscal investment in education should be expended. It also outlines the range of activities and reforms that affect all learners in the education and training sector. The Action Plan recognises the crucial role of education in reflecting on the past and the importance of educational leaders acting as custodians of heritage, culture, and language, enabling more creative ways to bring history to life. Central to the plan is recognising how people are treated, ensuring dignity and respect, and ensuring the well-being of all in the education and training sectors to enable them to thrive. It aligns with the definition of an age-friendly world – where everyone can contribute actively and is treated with respect regardless of age (WHO, 2020). It is also cognisant of making education and training more flexible, innovative, and responsive over the life course.  The plan aspires to improve society and the environment and contribute globally.

At an institutional level in DCU, the Action Plan for Education reflects DCU's mission "to transform lives and societies" (p. 8) by delivering a quality learning experience. It empowers learners by offering a range of opportunities to all "levels and age groups, which is enhanced through the richness of innovation, discovery and research" (p. 6).


### 3.8.1   The Sustainable Development Goals and Higher Education

The Sustainable Development Goals (SDGs; UN 2016) are also relevant to age-friendly policies. Higher education was never directly involved in the Millennium Goals in its own right or as an agent to advance the goals; it observed them from a distance by contributing to data and research (Duran, 2022).

A review of the SDGs (UN, 2018) cites the need for urgent action on population ageing, the "recognition of older persons' agency" (p. 17) and human rights. It calls for specific national policies to address ageing-related issues, citing examples from Costa Rica, Jamaica, Malta, and Romania. In addition to addressing SDG 4 (Quality Education), and SDG 8 (Decent Work), other common elements relevant to higher education include SDG 10 (Reduced Inequalities), SDG 11 (Sustainable Cities) and SDG 17 (Partnership for the Goals).

The review document (Ibid) refers to Agenda 2030's call for "leaving no one behind" (p. 6) to ensure that the SDGs meet the needs of all segments of society, focusing on older people. It puts higher education at the core of the 2030 agenda. Finland highlights the importance of ensuring that preparation and responses to the needs of the ageing working population are included when preparing for national and international challenges (UN, 2018). Mexico and Sri Lanka called for new eldercare models for their public investment programmes. The Republic of Korea expressed concern about the shrinking workforce, increased poverty rates and rural isolation. Universities have a clear role in acting as enablers for SDG implementation and helping countries respond to ageing-related challenges through science, technology, and innovation (STI) programmes. Andorra highlights an initiative by the Credit Andorra Foundation that has provided space and training for older people for free training in new technologies such as PowerPoint, publishing, digital videos, cloud data, and memory stimulation using computer science. Examples from Jamaica highlight success in communications technology and improved access to information. Romania highlights the use of innovative technology to measure the security of older people, especially in difficult climatic conditions. Many countries cite the need for safe and affordable transport, urban development policies, designated public spaces and "one-stop shops" for health care, and psychological, social and legal services.

Despite the need for action, age-related policies and priorities remain absent from many national plans, and governments still roll out SDG strategies. Calls from the UN General Secretary to all sections of society to mobilise for action cited three levels of engagement: (1) global action for greater leadership, more resources and smarter solutions; (2) local activities embedded in policies, regulatory frameworks of government, cities and local authorities and (3) people action – youth civil society, the media, private sector, unions, academia and other stakeholders (Apiday, 2023). Equally, the more significant role of the circular economy shows the need for cultural change to become more circular or less wasteful, which is also relevant to sustainability ( Deloitte & Touche, 2023; Khosla et al., 2022). Companies that engage with sustainability are good at doing so in research, strategy and management but not as well in manufacturing or operations. Universities working with industry have a definite role in influencing best sustainability practices (Lozano, 2023). These actions resonate with the call for change in higher education and require universities to become objects of change to support calls for societal transformation (Cuesta-Claros et al., 2023).

The integrative approach of Action Plan 2030 requires a comprehensive approach, and ageing is an area that straddles many goals. Universities are well placed to realise the SDGs through their programmes and influence the student cohort (Duran, 2022).  Kalache (2020) referred to this when he said "

> "all professionals must be prepared for the fact that a huge percentage of their patients, clients and customers will be older adults. If they have little understanding of older age, they will be far less successful in their respective vocations".

The Ten Principles are a robust foundation that aligns closely with and supports the Sustainable Development Goals (SDGs). They provide a distinct framework for universities to actively contribute to and advance the SDGs.

## 3.9    Ten Principles of an Age-Friendly University

The section below outlines the Ten Principles and draws on analogies and authority in academic literature to support them (Machi & McEvoy, 2009). It integrates the Principles into a blueprint, informing the AFU's rationale. The themes of the Principles often overlap, but I have addressed each individually to ensure a comprehensive review of each.

### 3.9.1   Principle 1 - Participation

*Principle 1 supports the concept of inclusivity and participation of older people in core activities of the university, including educational and research programmes.*

This principle aims to establish a culture in which older people are supported and integrated into the fabric of campus life.

Darmalasksana (2018) defines the core activities of a university as education and teaching, research and community service supported by academic administration, finance and accounting, human resources, campus infrastructure, student services and relationships (illustrated below in Figure 3.5). These core activities identified by Darmalaskana assist management in allocating resources to support the institution's vision, mission, and goals. Other stakeholder groups also closely relate to the core processes: students and alums, faculty, industry, community, other institutions, university management, employees and government.
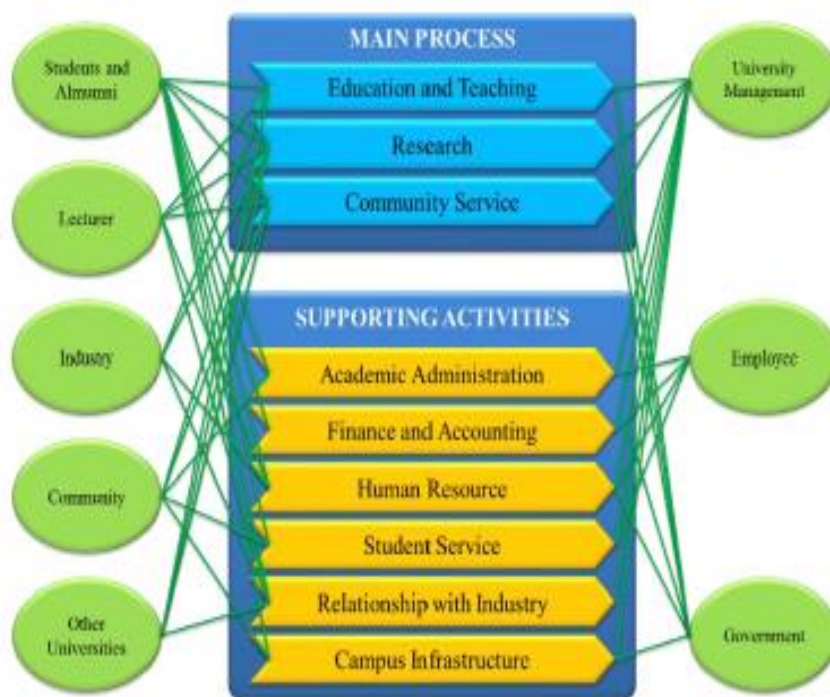
**Figure 3.5. Process and Stakeholder Relations (Darmalaksana et al., 2018, p. 789)**

Engaging older people in the university's core activities reveals the institution's mechanisms, such as programme registration, campus navigation, and educational processes. DCU also engages with student support and library services, harnessing mentoring opportunities based on older people's industry experiences, reciprocated by students delivering Smartphone and Zoom classes (O'Kelly, 2020).

Including ageing and older people in core university activities contributes to the discussion on broader topics of inclusivity and intersectionality, for example, raising awareness of ageism, tokenism, outreach, and open-door policies (Silverstein et al., 2019a).

Fernandez-Ballesteros (2012) found that older people who engaged in university programmes improved their core ageing, involving cognitive, social, and emotional factors contributing to active ageing, a fundamental tenet of age-friendly. Schuller and Watson (2009) addressed the sociological implications of ageing in universities as expressed in changing gender enrolment patterns, access policy, and curriculum provision, reflecting that while massification (transformation) in higher education is a good thing, there needs to be a broader discussion on the benefits and cost of higher education, the change in relative advantage, quality, efficiency, and tension.

Bjursell (2019) reflects on the many scholarly articles on the benefits to older people's education and well-being through participation in education (Graham, 2015; Maguire, 2016; Weinstein, 2004). However, why older people choose to do this reveals a narrative suggesting that family members and friends enrolled in the university help inform the decision to engage in higher education (Graham, 2015). Social factors discussed below are also of influence.

Participation in third-level learning provides many benefits for older people. Research indicates benefits to participants by stimulating the brain and keeping the mind active, improving mental functioning, meeting new people and forming new relationships (Talmage *et al.*, 2016). It also promotes the ancillary benefits of empowerment and a sense of purpose. As is the case for other adult learners, it provides a first opportunity for older people to access university education, bring their experiential learning to bear and build upon existing knowledge (Jamieson, 2007). There is also considerable research evidence that mental stimulation significantly contributes to the health and well-being of older people (Lee, 2006). The participation of older people in the third level breaks down stereotyping related to ageing, which is a barrier to the involvement of older learners. In an age-friendly university, the expertise of older people is valued and becomes more fully integrated into third-level teaching, learning and research (Wurtele & Maruyama, 2012).

The increase in the ageing population will continue to inform educational opportunities for older people. It is being galvanised by global risks such as pandemics, climate events, conflict, food shortages and a more violent society (Khan, 2019). Labour shortages result in a call to reframe retirement and skills. Educating older people is a means of emancipation and a tool for social change to meet these changes (Hachem, 2023).

### 3.9.2   Principle 2 – Personal Development and Second (Encore) Careers

*"To promote personal and career development in the second half of life and support those who wish to pursue second careers."*

How people define retirement is changing. It does not mean that most people will completely stop working. Many older people adopt new hobbies and activities, such as volunteer work (Ehlers et al., 2011; O'Connor et al.,2015). The rising number of older people is drawing the attention of governments concerned about the impact of ageing

populations, who see them as both a problem and an asset. Falling mortality rates, heart disease, stroke and an increase in life expectancy mean that older people live longer because of better medical interventions. However, governments and policymakers are concerned about social security concerns, rising demands on health services, and a diminishing work pool to support the ageing population (Nagarajan & Sixsmith, 2023). In the USA, Medicare has been running at a loss since 2004, and social security has been in deficit since 2017, indicating there is little dispute that healthcare costs will increase, making it challenging for the government to meet their fiscal obligations (Rice & Fineman, 2004).

The growing longevity gap between the USA and Europe is a multifaceted issue with significant implications for both regions.  The COVID-19 pandemic has profoundly impacted life expectancy, particularly in the United States. While many European countries began to recover their pre-pandemic life expectancy levels by 2021, the US continued to experience declines. This discrepancy is partly due to lower vaccination rates and higher levels of vaccine hesitancy in the US, influenced by political polarisation and misinformation. As a result, the pandemic exacerbated the existing challenges in the US healthcare system.  The differences in healthcare systems between the US and Europe also play a crucial role. The US healthcare system, largely for-profit, contrasts sharply with the more universally accessible systems in Europe. Many Americans face financial barriers to accessing healthcare, leading to poorer overall health outcomes. In contrast, European countries tend to have more equitable healthcare systems, contributing to better health and longevity (Corbett, 2022).

Additionally, higher rates of preexisting conditions such as cardiovascular disease, obesity, and diabetes in the US have worsened the impact of the pandemic and combined with the ongoing opioid epidemic, these conditions have significantly contributed to the decline in US life expectancy (Michaud et al., 2011). The pandemic has further exacerbated social and economic disparities in the US, particularly affecting poorer communities. The impact of COVID-19 has been more deadly in these areas, widening the longevity gap between the US and Europe, where social safety nets and public health measures are more robust.

The implications of this growing longevity gap are far-reaching. Public health in the US faces broader issues in management and access to care, potentially leading to increased morbidity and strain on the healthcare system as the population ages without adequate

support. Economically, reduced life expectancy can decrease the working-age population, impacting productivity and increasing healthcare costs as more people suffer from chronic conditions. This situation underscores the urgent need for healthcare reform in the US. Adopting policies that improve access to healthcare, reduce economic disparities, and address public health crises more effectively could help close the longevity gap over time (PLOS, 2023).

Overall, the disparity in life expectancy reflects broader social inequities that require comprehensive policy approaches, including healthcare, education, and economic support, to ensure more equitable health outcomes. Addressing these challenges is crucial to improving the US's life expectancy and overall public health outcomes .

One solution is radical policy change regarding ageing over the life course. A European Commission Green Paper on Ageing addressed these concerns by consulting with EU citizens to inform ageing policy over the next thirty years (European Commission, 2021) under four headings: early years, working life, retirement, and long-term care. A core aspect is a fundamental acknowledgement that citizens must engage in ageing to remain healthy and work longer. DCU AFU submitted a document to the EU on the Green Paper outlining views from over 300 participants comprising staff, students, AFU participants and older people from all over Ireland (O'Kelly, 2021).

The implications of extended longevity provide mutually beneficial opportunities for older people. Principle 2 encompasses the opportunity to engage in personal development, retrain or upskill, develop an enterprise, change direction, or focus on an encore career.

Desjardins et al. (2019) collated academic reflections on the implications, reactions analysis, and reviews to explore the role of active ageing versus lifelong learning in making a case for thinking about education and older people. References to life course transition to life after work, learning and employment for older people, the continuation of employability in the labour force, and attaining qualifications in older age contribute to merging the relationship between education and continued employment.

Maintaining contact with alumni is essential to supporting the university, building on the university brand, generating revenue through donations, and maintaining a lifelong, mutually beneficial relationship. Alums are a target audience for continuing education opportunities to reskill or upskill. Participants are more likely to engage in professional

development with entities with whom they have a trusted relationship (EAB, 2016; Chase, 2021). Short-term professional training and credential programmes, mentoring opportunities, alumni career networks, and academic support maintain the university's connections (Bishop, 2020).

Encore careers, described by Freedman (2009, p. 4) as opportunities for individuals "between the end of midlife and the arrival of true old age" to engage in meaningful work that matters personally and socially, have become part of the lexicon on ageing over the past years. Freedman asserts that older people need to stay engaged and purposeful. He identified factors that drive the transformation to a new phase of work in later life. These factors include insecurity concerning retirement income, a shift in pension plans, and erosion of health coverage.  Leveraging expertise and impacting the lives of their communities by combining work with a social purpose is also an essential factor.

The issues of ageing workforces and increasing dependency ratios are echoed in the OECD report on Senior entrepreneurship (Kautonen, 2013). There is an expectation that the number of older business founders will increase as the population ages, and there is an anticipation that more older individuals will become entrepreneurs or start businesses. However, this trend may not entirely be driven by choice; some older people might feel pressured or compelled to pursue self-employment due to various factors. These could include challenges in finding traditional employment opportunities, age-related discrimination in the workforce, or financial needs during retirement. What should be avoided is for older people to be "bullied and pushed", coerced or compelled to pursue self-employment due to external pressures or societal expectations, rather than making the decision entirely by choice.  Older people with extensive business experience and financial means may choose self-employment as a flexible alternative to working for an organisation, offering a better work-life balance. It also generates an income to allow the person to maintain their lifestyle. On the other hand, Kautonen explains that some older employees are being pushed from the labour market because of discriminatory practices in recruitment, ageism, and a lack of training and promotional opportunities.

Promoting senior entrepreneurship extends the working lives of older people, helps to reduce older-age employment, and increases their social inclusion. In addition, these initiatives benefit the economy by harnessing older people's expertise and human and social capital. Older entrepreneurs also help support younger entrepreneurs through

mentoring and extending network contacts while sharing their industry expertise. Some are also in a stronger financial position to develop an enterprise.

### 3.9.3  Principle 3 – Educational Needs

*Principle 3 - To recognise the range of educational needs of older people (from those who were early school-leavers through to those who wish to pursue Master's or PhD qualifications).*

Elements of the factors addressed in Principle 2 are also relevant to Principle 3. The White Paper on Adult Education (Department of Education and Science, 2000) informed Principle 3. It reflects the role of adult education and sets out policies and priorities for the sector's development. Adult education is defined in the paper as "systematic learning undertaken by adults who return to learning having concluded initial education or training" (p. 12). It included all aspects and levels of further education, both formal and informal. The report examined four sites: school, community, workplace and higher education. Three core areas underpinned the paper:

- A systematic approach to education policies over the life cycle, where learning could take place supported by guidance, counselling and childcare and a mechanism to assess learning independent of the context in which it occurred.
- Equality of access, participation and outcome for participants, with pro-active strategies to counteract barriers to participation.
- Interculturalism emphasises serving diverse populations that incorporate curricula, materials, training, and in-service modes of assessment and delivery methods.

In 2000, the OECD identified Ireland as having the lowest participation rates for mature European students (aged 25 and older). Since then, the situation has significantly improved, although challenges persist. In the 2018/2019 academic year, mature students comprised about 6.8% of new university entrants and 12.3% of those entering colleges and Institutes of Technology (O'Shea, 2021). Efforts to increase these numbers are ongoing, focusing on lifelong learning and adult education initiatives.

The Irish Universities Association has set ambitious goals to raise the lifelong learning participation rate from 6.5% to the EU average of 10.7% by 2030 (IUA, 2024). This

requires substantial structural changes and increased resources throughout the university system to better support adult learners. Ireland surpasses the EU average in overall educational attainment across all age groups. For example, in 2022, 62% of 25-34-year-olds in Ireland had tertiary education, compared to the EU-27 average of 42% (Central Statistics Office, 2023).

Despite these gains, the participation of mature students, especially those in employment, still lags behind the EU average. This gap highlights the need for flexible, accessible education options tailored to adult learners' needs. The Irish government has invested a ten-million-euro fund to foster innovative strategies and more "adult-friendly policies." Measures such as abolishing fees for part-time students and subject to means testing have widened access and inclusivity.

The White Paper on Adult Education (2000) emphasised the importance of lifelong learning as a governing principle of educational policy, promoting a coordinated, integrated role for adult education within a framework for lifelong learning. This principle has been embedded in broader policy areas as governments recognise the transformative value of lifelong learning for communities and societies (UNESCO, 2020).

While Ireland has made substantial progress in increasing mature student participation in higher education, continuous efforts and targeted strategies are essential to meet future goals and align more closely with EU averages.

The UNESCO Institute for Lifelong Learning (ILL; 2020, p. 9) presents a "future-focused vision of education which demands a shift towards a culture of lifelong learning by 2050." It outlines ten key messages and action points that strongly resonate with the Ten Principles of an AFU:

1. Recognise the holistic character of lifelong learning.
2. Promote transdisciplinary research and intersectoral collaboration for lifelong learning.
3. Place vulnerable groups at the core of the lifelong learning policy agenda.
4. Establish lifelong learning as a common good.
5. Ensure greater and equitable access to learning technology.
6. Transform schools and universities into lifelong learning institutions.
7. Recognise and promote the collective dimension of learning.

8. Encourage and support local lifelong learning initiatives.
9. Reengineer and revitalise workplace learning.
10. Recognise lifelong learning as a human right.

Similarly to the age-friendly ecosystem, UNESCO ILL refers to an existing ecosystem that integrates diverse learning modalities, including digital-based and experiential learning. Various learning modalities are also the focus of Principle 5, discussed below. While there were challenges for educators at the outbreak of the COVID-19 pandemic, it initiated new pedagogical and andragogical principles. Statistics. For example, there were innovative approaches to teaching that integrated digital methods and, as restrictions eased, adopted blended learning courses. However, realising the ILL vision requires an enabling environment for lifelong learning. The diagram below illustrates an approach toward creating this environment by identifying the challenges and transforming them into opportunities.
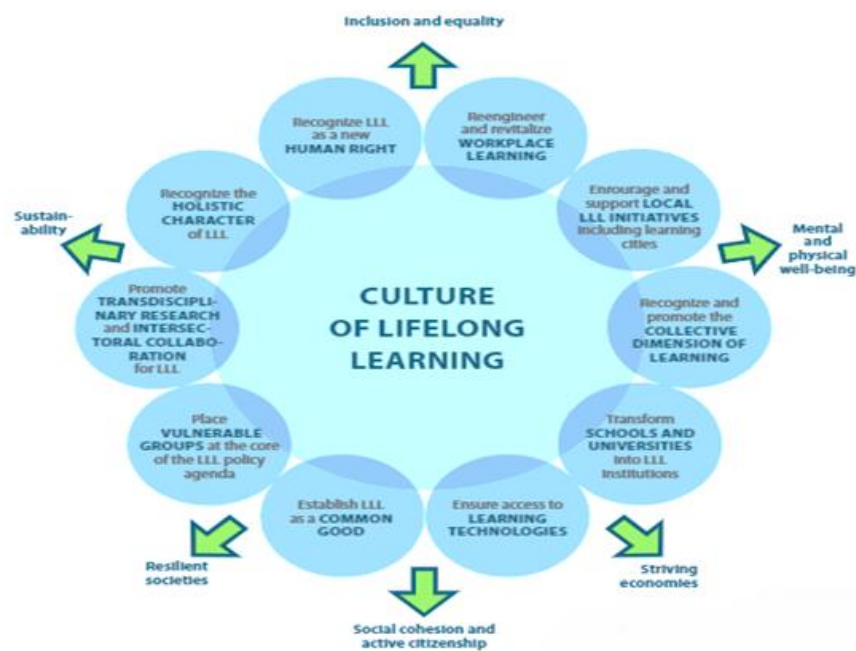


**Figure 3.6 (UNESCO Institute for Lifelong Learning, 2020, p. 20)**

The UNESCO report acknowledges the diversity within lifelong learning and explicitly highlights the empowering impact of learning in older age. It advocates for promoting quality education throughout one's lifetime. By incorporating more older people into

lifelong learning initiatives, there is the potential to harness economic benefits and positively contribute to the future of work, particularly in the context of the fourth industrial revolution. This perspective aligns with the findings discussed in the Context Chapter, as exemplified by Kalache's work.

### 3.9.4   Principle 4 - Intergenerational Learning

*Principle 4 - To promote intergenerational learning and the reciprocal sharing of expertise between generations.*

The European Network on Intergenerational Learning defines intergenerational learning as "the reciprocal sharing of knowledge between people of all ages so they can learn together and learn from each other and those in various sectors." (Dantzer et al., 2014, p. 14).

Global studies on intergenerational learning attest to the positive impact in higher education settings (Blieszner & Artale, 2001). Organisations can develop engaging and purposeful learning contexts attractive to different generations (Boström, 2014; Hertha et al., 2014).

Martins et al.'s (2019) review of the intervention, outcomes and effectiveness of intergenerational programmes found them a source of "social intervention" with a primary focus on education using formal and non-formal approaches. Intergenerational programmes facilitated the transfer and exchange of knowledge, skills, and resources, allowing different generations to identify differences and similarities that promoted greater awareness and understanding. Engaging younger people in intergenerational programmes increased their motivation to learn and gave them a more positive attitude towards ageing. It also had similar positive effects on older people. It promoted greater life satisfaction, a sense of purpose and value, improved cognitive function, and mental and physical health. Both generations reported an increase in self-esteem.

Buchanan and Rothkirch (2018) explore the role of grandparents and their increasing influence on rearing the next generation. They raise questions about the differences between parenting and being a grandparent, whether lineage, gender or marital status influence grandparenting, how cultural patterns shape contemporary grandparenthood, and the social policy implications. Contributors to their research reflect their global perspective

of how grandparenting influences future generations, the impact of demographic, social and cultural factors that shape how extended families interact in different populations, and how grandparenting impacts society.

O'Hara et al.'s (2013, p. 108) study on an intergenerational learning project at a conceptual and practical level concurs with many of Martin's findings. Mezirow's (1991) theory on transformational learning as a theoretical framework identified three core classifications of the perceptions of intergenerational engagement by participants comprising students and older people, which resulted in a transformational experience. These included:

- Positive effects on personal development – competence and innovative thinking, reflection, and awareness of leadership skills, reviewing career choices and opportunities for the future and volunteering opportunities.
- Intercultural understanding – breaking down cultural and language barriers, friendships between different cultures, knowledge transfer to breakdown cultural and geographic divides.
- Intergenerational solidarity – life experiences and understandings between generations and raising awareness of the learning needs of older people.

The research concluded that intergenerational learning provides an excellent example of transformational learning in action.

Boström (2014) reflects on the importance of several factors that impact intergenerational learning. These factors include the historical backgrounds of generations in communities, regions, and countries and their culture, values, and traditions. Intergenerational programmes impact the young and old and provide a lifelong perspective. Intergenerational learning is a valuable tool in intercultural settings. It offers opportunities to connect and learn more about each other, promoting integration and mutual respect. Martin's (2019) research reiterated Boström's finding that intergenerational programmes embraced generational social and political problems in historical and social contexts.

Evidence gathered by the National Institute of Adults Continuing Education (NIACE; Schuller & Watson, 2009) indicates that intergenerational learning contributes to sustaining growth and prosperity and promotes fairness and opportunities for all. It also makes communities more robust, promotes a better quality of life and supports a more secure, fair, and environmentally sustainable world.

Schuller et al. argue that spending on intergenerational learning is an investment for everyone's future well-being. Younger people, over time, will contribute to the economic prosperity in which all will share, develop multidisciplinary innovations, and finance the welfare system. Middle-aged people are already doing this and shouldering the tax burden as employees. Investing in older age (or fourth age) demonstrates to younger people "that they too will accede to the benefits in the future" (p. 103). Investment in intergenerational learning reduces dependency costs and gives agency to older people to remain independent and make health and service decisions. Pitching generations against each other to compete for sectional interests should not be part of the dialogue. Figure 3.7 below illustrates the concept. Public finance contributes upwards toward the fourth stage (pensions and healthcare) and downwards towards the first education stage. Private money flows downwards from the fourth stage to assist younger people. Schuller et al. caution that this is subject to shifting over time as each generation ages; therefore, the concept of an intergenerational contract to bind the arrangement together is essential.
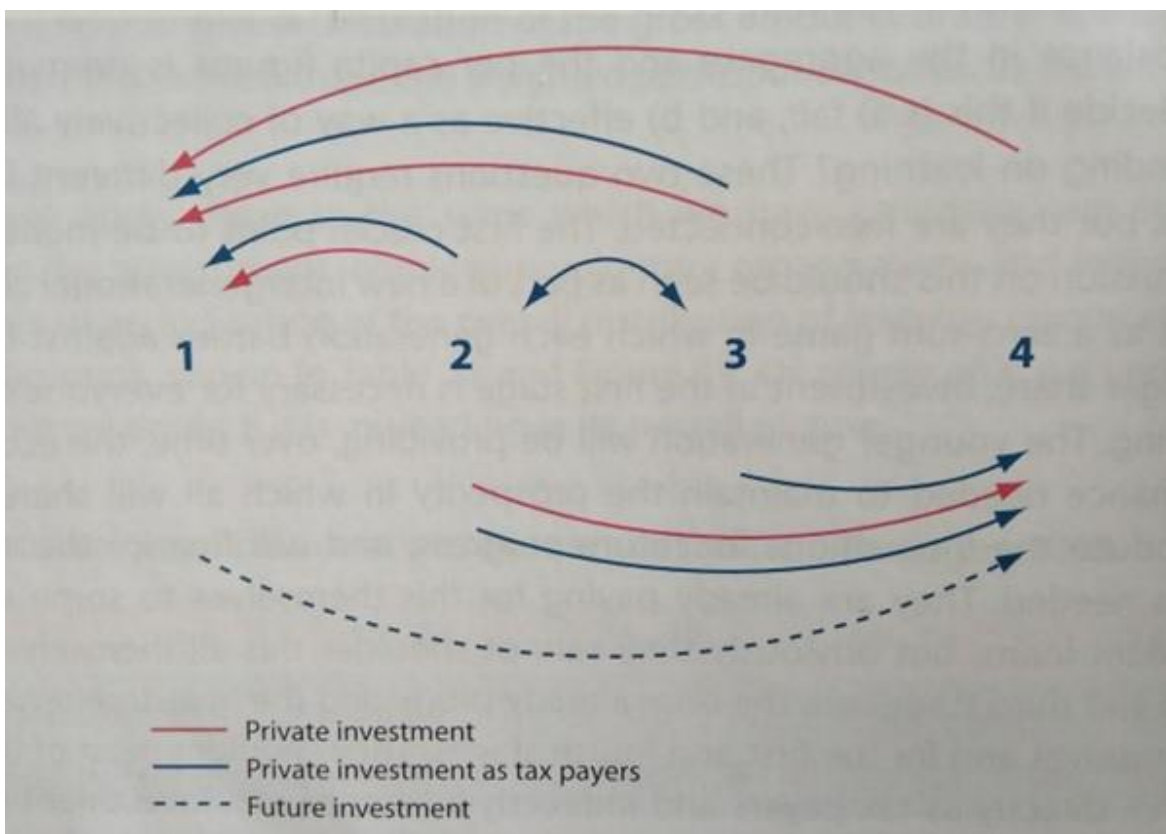


**Figure 3.7. Investing in Learning: Intergenerational Links (Schuller and Watson, 2009, p. 104)**

Research by Pstross et al. (2017) examines the role of universities in promoting intergenerational learning and the reciprocal sharing of expertise among learners of all

ages. In a comparative study on how this is interpreted and implemented at Arizona State University (ASU) and Dublin City University, researchers found that intergenerational learning occurs in many forms. The participating universities had two approaches to the intergenerational programme; DCU drew participants from different programmes and grades. ASU delivered a specific programme as a group project. These projects illustrate two methods linked to a shared vision that creates an AFU. A recommendation from the research calls for the support of long-term partnerships at the faculty level for intergenerational learning to become a staple of university curricula.

Another impact of intergenerational exchange is knowledge sharing. A research project on knowledge sharing between different generations examined cross-generational workplace mentoring (Brčić & Mihelič, 2015). Sharing knowledge between employees is an advantage to intellectual capital as it transforms individual understanding into organisational learning. It also contributes to knowledge creation, idea generation and problem-solving. Researchers found that each generation has a distinctive communication style, an essential consideration when managing an increasingly age-diverse workforce. Developing strategies to facilitate knowledge exchange between ages in the workplace is critical for organisations to retain the knowledge and experience generated by older workers and share it with younger employees. Mentoring, mutual learning, and competence development facilitate knowledge exchange for older and younger workers, especially regarding technology.

Schuller et al. (2009, p. 13) posit that "education fosters social capital – the glue that binds society together." Solidarity can only be taught in a limited context. Universities provide the space for people from diverse backgrounds to come together with a common learning goal. It increases an understanding and recognition of differences in age, generation, social class, ethnicity, and other social variables. While it may not impact solidarity, it increases the chances of it. The university environment provides a fertile opportunity to change the narrative on ageing to promote age inclusivity and foster mutual respect between generations.

### 3.9.5   *Principle 5 – Online Educational Opportunities*

*Principle 5 - To widen access to online educational opportunities for older adults to ensure a diversity of routes to participation.*

The Council of Europe project (1999) defines access as "The widening of participation in good quality higher education to all sectors of society; the extension of participation to include currently under-represented groups; and a recognition that participation extends beyond the entry to successful completion." (Halimi & Hristoskova, 2001)

A 46-year-old list of the changing social contract between higher education and society compiled by the International Labour Organisation (1975) called on universities to:

- Play an essential role in the general social objective of achieving a more excellent quality of opportunity.
- Provide education adapted to a greater diversity of individual qualifications, motivations, expectations, and career aspirations.
- Facilitate the process of lifelong learning.
- Assume a public service function and participate directly in social change.

This list is still relevant and discussed as a road map to improving access routes to higher education for diverse population groups. For the past four decades, lifelong learning and social and economic innovation have been distinct themes in global, European, and national policy documents (UNESCO, 2020: World Bank, 2019).

Butcher's (2020) reflections on widening participation and lifelong learning found that widening participation is complex and context dependent. Despite numerous efforts within institutions to broaden access and support inclusivity, there is no uniform approach to dealing with unequal access.

Over the past few years, there has been a significant increase in online courses, from massive open online courses (MOOCs) and open educational resources (OER) to specific credited programmes aimed at learners of all levels. This expansion suggests that online courses offer opportunities to enhance or widen participation in lifelong learning (Cannell, 2017). Despite these opportunities, take-up is low, and barriers hinder participation. Cannell identified three categories of obstacles encountered by learners participating in formal education: (1) situational barriers arise from socio-economic disadvantage, location and disability; (2) institutional barriers arise when support systems and curricula fail to meet learners' needs; and (3) dispositional barriers that are the subjective impact of prior experience. The most successful path for non-traditional learners is to engage in informal or part-time learning. The success of DCU's Love of Lifelong Learning Programme is

testimony to this. Participants come to the programme and become immersed in other programmes and activities at the university. Huges et al. (2021) outlined these in a five-year review of DCU's AFU activities.

Technology is essential in employment, accessing education, and participating in society as a citizen, consumer, or economic contributor (O'Kelly, 2018b). Schuller et al. (2009) refer to equal technological access as fundamental to social and economic participation. Despite the increased access to digital devices, a digital divide remains. Several factors contribute to this digital divide: the availability of broadband, a lack of an appropriate device, and the knowledge and skills to use it. Navigating and accessing information sites can be challenging. Understanding what one needs to know and critically evaluating websites may result in uncertainty and confusion and undermine self-confidence. These factors represent barriers to participation. Opportunities to support good practice and overcome these barriers include peer support, creative and innovative multi-modal delivery, and good communication channels between participants and course leaders.

Evans et al. (2019) explored how the concept of widening access is interpreted and implemented through policy enactment. In an analysis of institutions, differences in approach reflected policies and assumptions about the type of student admitted to programmes. Institutional interests and priorities concerning their position in a globally marketised higher education system were also factors. Evans found that the globalised higher education system in which institutions are positioned has homogenised its approach to widening access. While subtle distinctions may be observed between institutions, their methods typically attract mature learners. Specific strategies to widen access aimed at younger people with socio-economic disadvantages were beneficial to supporting access practices that promoted part-time, flexible learning modes. These are essential in supporting access to groups underrepresented in higher education, such as older people.

While technology is a key to widening participation, other approaches to engaging older people should not be overlooked. Innovative techniques, collaborations with colleagues, and investment in time, resources, and institutional support are essential to success (Rainford, 2021).

### 3.9.6   Principle 6 – Research Agenda

*Principle 6* – To ensure that the need informs the university's research agenda of an ageing society and to promote public discourse on how education can better respond to the varied interests and needs of older adults.

Walker (2007) suggests two main reasons older people should be involved in ageing research. One is a matter of human rights, as older people have a right to be involved and consulted in research about them. Research results involving a participative process enrich the researcher and the older person. Secondly, involving older people contributes to the researcher's understanding of ageing and its impact on quality of life. Walker refers to an example from research on developing assisted technology products being inadequate if it does not involve the older end–user. In addition to epistemological and ontological factors of engaging older people in research, This concern is tied not only to epistemological and ontological factors but also to **ontological** factors. Ontological factors in this context refer to the nature of being and existence as they pertain to older people, for example:

**Real-Life Context and Experience**: Understanding the real-life contexts in which older people live is crucial. It includes the environments they inhabit and the daily challenges they face. Designing technology without considering these factors may lead to products that are not practical or usable in their intended contexts.

**Physical and Cognitive Abilities**: It is essential to recognise the physical and cognitive changes that come with ageing. Products must be designed to accommodate reduced mobility, vision, hearing, and memory capabilities.

**Psychosocial Aspects**: The emotional and social aspects of ageing play a significant role. Technology must consider factors such as social isolation, the need for companionship, and the desire for independence.

**Personal Identity and Autonomy**: Technology should support and not undermine older people's identity and autonomy. It means creating solutions that respect their preferences, routines, and sense of control over their lives.

**Ethical Considerations**:  Ethical issues around privacy, consent, and the potential for technology to become intrusive or paternalistic must be carefully considered.

**Political**: where data supports specific campaigns, such as challenging ageism. These contribute to socio-cultural transformation (Walker, 2006), and by addressing these ontological factors, developers can create assistive technologies that are genuinely beneficial and empowering for older people. Ignoring these factors can result in ineffective or even detrimental products to their intended users.

Laimputtong (2015) discusses the practical issues of conducting participatory research with older people and includes theoretical discussions and case examples. Participatory research provides opportunities for researchers to understand complex health and social problems older people encounter. It contributes to policy and decision-making in health and social service delivery and individual and community capacity building. It also complements traditional investigator-driven research, primarily focused on biomedical perspectives.

As universities are increasingly under pressure to engage with external partners, the growing emphasis on corporate social responsibility, governance, stakeholder engagement, and higher education's interaction with society relates to both economic, social and external institutional functions and teaching, research and knowledge transfer (Jongbloed et al., 2008). While the primary responsibility is to their students, universities have many other stakeholders, such as the government, which, as a funder of higher education, ensures the university meets the needs of students and society. Other interactions include those working in training and research in health, industry, culture, territorial development, and the labour market, affecting the higher education research agenda. The multidisciplinary nature of research examines new ideas, models or theories and includes those with real-world experience in a discipline to bring those models and approaches to life and understand how behaviours, theory and practice are enacted. Engaging stakeholders in research also gives a better understanding of data sets, helps influence policy and helps students understand policy relevance. Engaging in dialogue with external stakeholder groups brings academic work to life and supports peer research. It also allows students to delve into research and develop critical analysis skills. One lecturer said, "Students don't learn from reading alone; they must interact with research and those stakeholders who are experts in the subject so that students can discover things for themselves" (City University of London, 2014).

A citizen-researcher assisting the National Innovation Centre for Ageing (National Innovation Centre for Ageing, 2021) recounted her role in working with researchers to

contribute to and inform research. She explained how she contributed to the study by undertaking reviews and providing lay summaries, bridging a gap between the public perception and understanding of research and the scientific community. Participating with the Centre provided an opportunity to be involved in diverse projects, support researchers, and assist with product and service development by bringing together different end-user perspectives. Reflecting on her experience and rationale for involvement, she mentioned that she felt her contribution benefited the public, helped mitigate risks and contributed to society.  Ultimately, her engagement contributed to a better world for her grandchildren and the broader community.

Rosowsky (2022) discusses the role of universities and why they matter, highlighting university assets as a "concentrated community of scholars, facilities and collective expertise" and elaborates on the benefits to societies as they advance research and teaching through their work. Universities' role in engaging in research lies in their missions relevant to learning, teaching, and scholarship. The significant financial investment required to undertake research and engage the interrelated fields to inform it is essential to advance knowledge for the good of society. It contributes to economic development both directly and indirectly, drives innovation and addresses world problems to understand the present context of our lives and address future challenges.

### 3.9.7 Principle 7 – Longevity Dividend

*Principle 7* – To increase the student's understanding of the longevity dividend and the increasing complexity and richness that ageing brings to our society.

> *It is not by muscle, speed, or physical dexterity that great things are achieved, but by reflection, the force of character and judgement: and in these qualities old age is usually not only not poorer but is even richer"* – Cicero,106-143 BCE.

The American Federation on Ageing Research (2021) determines, "If we can target the biology of ageing, we can delay age-related disease. This can save health care costs and add life to our years: we call this the Longevity Dividend".

The contemporary language of the longevity dividend originated in 2006. However, the concept initially posited by Mc Kay et al. (1956) suggested that successful laboratory experiments that extended the lifespan of animals justified experimental manipulation of

the lifespan in humans (Olshansky, 2019). Hayflick (1977) suggested that being old and being aged are different. Research to slow down ageing should help us get old without becoming International Longevity Center (ILC; Dimitriadis, 2018), providing evidence to support the longevity dividend old. Similarly, Andrew Scott suggested that longevity is viewed as the "whole of life," whereas ageing is considered to be the "end of life" (Milken Institute, 2017).

O'Neill (2011) poses an interesting question to the medical profession: Are they, through their studies, sufficiently educated about the enormous benefit of ageing into later life and the privilege of protecting the longevity dividend?  Rather than being exposed to continued resistance and negativity to the benefits of ageing in many countries with growing ageing populations, it is puzzling that there continues to be resistance and negativity towards recognising the benefits of ageing. What is particularly surprising is the lack of growth in the number of geriatricians. Working with older individuals offers significant rewards, including engaging with the ageing population, the intellectual challenge of managing their complexities, and the appeal of collaborating in interprofessional teams. These factors should theoretically attract more professionals to specialise in geriatrics, yet the trend suggests otherwise.

Scott (2021, p. 500) suggests that the longevity dividend is achieved through a positive correlation between life expectancy, health, and the economy. Longer and healthier lives should generate more resources and be reflected in economic growth. At the heart of the longevity dividend, Scott argues that healthy ageing requires "exploiting four forms of age malleability:" behavioural, environmental, socio-economic, and biological. Scott cautions that positive trend improvements cannot be continuous because ageing is malleable. He cites policies from public health campaigns that address obesity (sugar tax) to environmental factors (clean air and urban planning), encouraging social interactions that influence how we age. Investment in addressing health inequalities and socio-economic issues that can delay ageing has significant potential gains. The challenge to global life expectancy is to age well across the life course; longer, healthier lives benefit individuals and the economy. Olshansky (2016) reiterates this in his research. Longer lives will result in longer working careers, and barriers that hinder older people from remaining in the workforce must be challenged by offering more workplace flexibility and investment in adult education (Scott, 2021). To achieve longevity dividends, governments must address inequalities in health, work, and the environment and maximise the malleability of ageing.

Scott's research is supported by data published by the International Longevity Center (ILC; Dimitriadis, 2018), providing evidence to support the existence of a longevity dividend. Data indicated that "as life expectancy increased, outputs per hour worked per worker per capita also increased" (p. 7). Flynn (2021), who examined the ILC report, found that the burden of increased longevity in pension systems and social care is shifting costs from the state to the individual. Employers and older individuals are concerned about employment, pension provisions, and retirement. Meanwhile, younger generations recognise the necessity of supporting an ageing population. If older people opt to stay in the workforce longer, it will significantly influence the job market. Flynn suggests a solution to this, which moves the narrative on ageing as a burden to enhancing productivity through intergenerational mentoring and job sharing. It also provides mutual opportunities for care and support between generations. Flynn concludes that living and working for longer helps retain skills and knowledge. The challenge for employers is how to maximise these assets and harness older workers as a resource. Investing in helping older people upskill and reskill, promoting lifelong learning and intergenerational solidarity, and normalising older people's place in learning environments help create a future where increased life expectancy can benefit all.

Every generation has something to contribute to enrich our society. The accumulated experience, wisdom, and talents can advance society as we age. Increased longevity is a human achievement that should be celebrated, yet we are constantly exposed to ageist images and discriminatory practices against older people throughout life (O'Neill, 2011).

The narrative on ageing needs to change to be recognised as another phase in life. Intergenerational engagement, which considers the diversity and potential of all ages and changes to policies and practices, is needed to promote equality and solidarity (Sugar, 2021).

### 3.9.8   *Principle 8 Health and Wellness, Arts and Culture*

*Principle 8 - To enhance access for older adults to the university's range of health and wellness programmes and its arts and cultural activities*

There is significant literature on the benefits of including older people in creative arts (Noice et al., 2014). Emerging studies on healthy ageing through participatory arts are

relatively recent. Participatory arts are concerned with making art rather than consuming art. Noice et al. identified two distinct approaches: wellness studies promoting cognitive and physical health in older people in normal daily activities and treatment studies focusing on therapeutic art-making. Evidence supporting the cognitive benefits of writing genres, drawing, dancing, and photography also indicates advantages such as enhanced social connectedness, decreased anxiety and depression, mental stimulation and pleasure. Phillips' research  (Flood and Phillips, 2007; O'Shea and Ni Leime, 2012) explores the relevance and impact of creativity on mental and physiological health. The benefits of engaging in these activities are becoming recognised in emerging research on social prescribing (Johansson et al., 2021). Engaging older people in participatory and creative arts has benefited individuals and communities, supporting Phillip's findings.

Fisher et al. (1999, pp. 457–472) define creativity as a "process requiring an individual to be open to new ideas and approaches, to seek an original solution for a problem or challenge." Their research examined how creative activities contributed to successful ageing. Creative activities develop problem-solving skills, adaptive confidence, and a deeper understanding of self and cultivate meaningful involvement, contributing to later life well-being.  Despite age, engaging in creative activities also fosters a perception of growth opportunities. Fisher et al. (p. 470) reflects that "living our lives is one long process of creating and developing our sense of self and our connections to others… it is a creative expression of self that lives on in the lives of those we leave behind."

Cohen's (2006) research exploring the positive impact of the arts on health and illness suggests that medical care, which primarily focuses on treatment planning – "signs and symptoms" should also include "skills, strengths and satisfaction" (p. 14).  He suggests that a focus should be on a person's potential and the clinical problem. Cohen asserts that midlife is when one confronts mortality as it combines the capacity for reflection with a desire to create meaning in life. As one grows older, retirement provides an opportunity to have the confidence to express one's opinions, experience "external liberation," and experiment with new things. Engaging in creative art and cultural activities provides a sense of mastery and increased empowerment; if a person can master something new which previously seemed impossible, it raises the possibility of trying other opportunities.

Physical activity as a driver of health and longevity is the focus of Langhammer et al.'s (2018, p.1) research, who define physical activity "as any bodily movement produced by

skeletal muscles that results in energy expenditure." Promoting exercise among older people is an essential public health and clinical issue, as participation in physical activity contributes to maintaining the quality of life, health, and physical function. Exercise also benefits the brain.

"Creativity in later life provides an invaluable lifeline to understanding the benefits of societal ageing, thereby transmuting the feared "grey tsunami" into a demographic dividend" (O'Neill, 2011, p.1828). It also provides a mechanism for older people to illuminate the complexities of ageing and negate people's fear of growing older. O'Neill elaborates on this by referring to examples of creativity in older age and the radicalisation of older age, arguing that while older age is regarded as decay and decline, numerous artists defy that image and continue to contribute by creating often controversial but beautiful and meaningful art well into their eighties (e.g., Matisse, Monet, Titan, Goya, Stravinsky, Baccarat, Sibelius, Herrera, Gaboriri).

While universities have a clear role in teaching, learning and research, they also have a cultural role in the community (Chatterton, 2000). Aside from offering academic programmes in arts, their role in nurturing creative arts in the community is frequently overlooked. Universities provide mixed-use venues as sites of social centrality for the cultural community and a platform for art students to offer complimentary showcase activities of their academic study to a broader audience. The student union is also an essential interface between the community and the university, as they often facilitate cultural events such as theatre, music, and comedy showcases. Universities are a "seedbed" for fostering creative talent and experimentation. It reflects the changing nature of universities, the "opening out" of the university to the community and raising awareness of other university opportunities such as lifelong learning or wellness programmes.

### 3.9.9   Principle 9 - Engaging Retirees

*Principle 9 – To engage actively with the university's retired community*

Retirement groups within higher education encompass academic, administrative, and support personnel (Woodford, Hutchinson and Ausman, 2023).  However, scholarly literature concerning retired staff in higher education predominantly concentrates on

academic staff or retirement research. I will explore this principle within the context of academic staff.

Changing world demographics and a global ageing workforce have influenced attitudes towards retirement.  Retirement is considered a significant life transition, although it is subject to reduced economic productivity and increased vulnerabilities (Moffatt & Heaven, 2017). It is becoming increasingly common for older workers to delay retirement. Many older people do not have a pension provision to support their retirement adequately or wish to remain engaged as they feel unready to transition to retirement (Oireachtas, 2021). Kaskie (2017) found that the number of academics continuing to work past age 65 surpassed that in the general labour force. He questions institutional policies and programmes, positing that higher education institutions "should provide more opportunities to older faculty to remain healthy and productive or focus on facilitating retirement?" (p.816). Kaskie found that even when academic staff had the autonomy to create a retirement pathway, they seldom moved out of academia (Boulton-Lewis & Buys, 2014). Some academics found that they did not have an adequate pension provision and unfortunately found themselves "reluctant retirees".

At an institutional level, long-term academic staff are more expensive to employ as, with age and productivity, they incur higher salaries and benefits in addition to health care costs. Kaskie also found that most institutions took an ad hoc approach to accommodate and transition older academics; there was no uniform approach. While some universities offered a move to part-time or phased retirement, many scholars did not choose this option, as it would impact their pensions. Kaskie makes several recommendations for accommodating older staff, from providing opportunities for wellness, counselling and work-based programmes to changing policy and programming. He also recommends that the Human Resources department undertake some training in gerontology to inform modifications to policies and programmes.

Cahill et al. (2019) examined the experiences of academics transitioning to retirement. Their research reiterated Kaskie's assertion that phased pathways to retirement were an option that would benefit staff. Cahill et al. identified a need for those transitioning to retirement to plan for at least five years in advance. They observed that informal or formal planning inspired confidence about retirement, whereas a lack of planning resulted in a negative attitude and problems adapting. Facilitated meetings between those transitioning

to retirement and those already retired were beneficial.  Cahill also found that negative age stereotypes and ageist attitudes in the workplace are increasing. Cahill emphasises the need for planning, wellness, and family and social support to transition to retirement.

"Many healthy and vital senior professors resist conventional notions of retirement, featuring a loss of identity, stimulation, purpose and meaning*" (Baldwin et al., 2017, p. 4)). Contemporary views on ageing have changed how retirement is viewed, as many people still feel they have a lot to contribute and are not ready to retire. Retirement associations in higher education are vital to transforming academic retirement. They have a role in maintaining social and collegial connections and provide opportunities for retired academics to maintain institutional affiliation, identity, and a continuing sense of purpose. Increased short-term contractual posts have replaced tenured positions, giving rise to a loss of institutional memory, wisdom, and skills.

Retirement associations take different forms; while some are scholarly, others are primarily social. In the United States, some retirement associations support scholarships and research programmes, mentoring, multidisciplinary seminars on challenging debate topics, lunch colloquiums, and dedicated support staff and meeting venues. Retirement associations seldom have visibility on campus and are supported via modest subscriptions and, in some cases, by the institution. Baldwin's research outlines several opportunities for retirement associations in higher education to have a more visible, sustainable role in the university. He cites the benefits of strategic outreach to retirees to enhance existing university programmes, maintain institutional memory, and mentor emerging career academics. The changing narrative on ageing demonstrates a need for new structures for older staff and recognition of age inclusivity on campus through the retirement association.

### 3.9.10  Principle 10 - Dialogue

*Principle 10 –" To ensure regular dialogue with organisations representing the interests of an ageing population."*

The Age-Friendly Cities Project (AFCP), launched in 2006, engaged in a research-to-action approach that brought together focus groups with older people, caregivers, families, and service providers to identify the factors that made a community more "age-friendly". The study identified three main elements of the AFCP guide - service provision, the built

environment, and social aspects. It is the most frequently used document to evaluate the goal of age-friendliness (Plouffe & Kalache, 2010). The involvement of older people in every step of the process is crucial in age-friendly work (WHO, 2018). Van Hoof et al. (2021) discussed various methods to engage older people and older people's organisations as critical partners to inform age-friendly plans to improve the social and physical environment. Van Hoof et al. make several recommendations to improve an age-friendly cognizant climate, including broadening and promoting cross-sectoral collaboration to leverage change and develop co-creative programmes that include older people and older people's organisations. As partners, they could inform plans for different target groups to facilitate transparency in action plans and route maps.

Participatory research is an umbrella term for research design, methods and frameworks that use systematic enquiry (Cargo & Mercer, 2008). Vaughn's (2020) approach to participatory research methods and frameworks highlights the value of participatory research as it engages those who are not trained in research but represent the interests of those who are the focus of the study and focuses on collaboration with stakeholders, communities, and end-users in the research process. The importance of maintaining dialogue with the organisations representing interest groups results in many benefits, including "relevant real-world contexts, results that can be more easily translated into community and non-academic settings, and research quality and rigour that is improved by the integration of researcher's theoretical and methodological experiences into a mutually reinforcing partnership" (Cargo & Mercer, 2008, p. 327). Engaging with stakeholders allows researchers to engage more deeply, benefit from collective wisdom and expertise in the research, and broaden its impact (Vaughn & Jacquez, 2020).

Engaging in a participatory approach is not just relevant to research; engaging with stakeholders continuously informs a mutually beneficial exchange of knowledge and resources in partnerships and reciprocation (Sheila et al., 2021). It also contributes to building relationships of trust and respect and involves partners in mutual dialogue, which improves understanding. Shelia et al. refer to Trayner's (2015) concept of Communities of Practice (CoP), which complements participatory research. The table below lists the factors and examples of using the CoP approach.

**Table 3.3. Examples of factors in Communities of Practice (Wenger and Wenger Trayner, 2015)**

| Factors | Examples |
|---|---|
| *Problem solving* | "Can we work on this design and brainstorm some ideas; I'm stuck." |
| *Requests for information* | "Where can I find the code to connect to the server?" |
| *Seeking experience* | "Has anyone dealt with a customer in this situation?" |
| *Reusing assets* | "I have a proposal for a local area network I wrote for a client last year. I can send it to you and you can easily tweak it for this new client." |
| *Coordination and synergy* | "Can we combine our purchases of solvent to achieve bulk discounts?" |
| *Building an argument* | "How do people in other countries do this? Armed with this information it will be easier to convince my Ministry to make some changes." |
| *Growing confidence* | "Before I do it, I'll run it through my community first to see what they think." |
| *Discussing developments* | "What do you think of the new CAD system? Does it really help?" |
| *Documenting projects* | "We have faced this problem five times now. Let us write it down once and for all." |
| *Visits* | "Can we come and see your after-school program? We need to establish one in our city." |
| *Mapping knowledge and identifying gaps* | "Who knows what, and what are we missing? What other groups should we connect with?" |

It emphasises cooperative learning, joint activities, sharing and supporting information, exchanging ideas, and creating connections. Bi-lateral agreements and work plans benefit both institutions and communities. Shelia et al.'s research concludes that CoP is emphasised when engaging the stakeholders to foster co-creative collaborations to develop effective interventions to address and support both needs.

## 3.10    Operationalising the Ten Principles

The challenge of operationalising and implementing the Ten Principles is a reoccurring question expressed by institutions that found an AFU's "somewhat abstract" concept challenging (Lim et al., 2021). Lim developed a questionnaire targeting the AFUGN members, covering five areas: social engagement and support, lifelong learning needs, older people's needs, an age-friendly environment, and administrative support. The survey aimed to develop guidelines for an institution to self-identify age-friendliness to operate

the Principles. The guidelines are not for ranking institutions of the AFU or eliciting a level of response to join the network but are the first iteration of an administrative tool to check the university's age-friendliness when joining the network. It also provides a mechanism to evaluate the abstract concept of AFUs. Lim's research determined that the indicators could suggest the strategic direction for the AFUGN while being cognizant of recognising the diversity of perspectives reflected by the country's characteristics, institutional culture, and situation. The development and application of the guidelines need to be fluid, contextual and flexible to align with the spirit of the AFCP.

Silverstein's (2019b) research provided another approach to implementing the Ten Principles by auditing the age-friendliness of US-based AFU members who were also members of the Academy of Gerontology (AGHE). The audit explored campus life, including administration, career counselling, communications, student life, campus services, distance education and health and wellness services. The audit results showed that many people were needed to engage and achieve campus-wide age-friendliness as it was not achievable by one person alone. The audit also demonstrated opportunities to increase knowledge and raise awareness of age-friendly practices. The audit suggested tracking registration data by more precise stratified age intervals to assess the validity of individual items listed in the research study and reduce the number of items that reflect prominent themes arising from the research. A further recommendation suggested developing an audit tool as a resource for other institutions. Silverstein's study demonstrated that the assessment process for age-friendliness needs to be ongoing and cultivated over time and throughout the university community.

Cannon's (2021) research focused on strategies to strengthen relationships between a university and a senior centre partnership; it explored options to develop a learning centre for lifelong learning and remove barriers to accessing higher education. It concluded by observing that structural and institutional changes need to be implemented to create a more inclusive university.

Simon et al. (2022) conducted an environmental scan of Eastern Michigan University, coupled with interviews with management, staff, and participants at the university, resulting in three key themes: (1) experience sharing; (2) the existence of age-inclusivity barriers; and (3) opportunities for change and intentionality in age-friendly efforts. They found a general understanding that "age-friendly" implied inclusion, but an action-

orientated definition remained unclear, and they struggled to identify explicit age-friendly actions on campus. Several gaps identified the need to examine internal and external communication, how older learners were perceived, accessibility to services and resources and how older learners brought a perspective to the university, which helped connect academic courses to real-world situations. The authors concluded that to address these gaps, the institution needed to examine these barriers further and make changes to accommodate the needs of older learners.

### 3.10.1  Embedding and Implementing Change

The plurality and complexity of universities are well documented (Biesta, 2013; Chimaechi, 2018; Zgaga, 2009). Clark (2004) discusses the increasing pressure on universities to change how they operate, reflecting many of the observations by other scholars referred to previously about the role of universities (Chatterton, 2000). Before exploring how to implement change in higher education, there is a need for a broader review of the factors influencing change in higher education.

Implementing and cultivating the concept of the AFU required change, which was led at DCU by the President (Senior Time, 2016).  The Ten Principles of an AFU provides a framework that coalesces ongoing activities in higher education into age-related teaching, learning, research and engagement. However, embedding and implementing the Ten Principles requires new thinking and a broader understanding of previously untapped markets.

Clark (2004) created a coordination triangle between state authority, market and academic oligarchy, leading readers to reflect on the qualitative differences between market coordination and how it was affected by state and higher education institutions. He listed several types of markets – consumer markets, academic job markets, and institutional markets. He reflected that people decide on the market to achieve a purpose - "people and organisations pursue markets, markets do not". Clark observed that in higher education, people pursue markets favourable to their cause, and universities seek to define and use markets as conditioning arenas for interaction, which has contributed to more market-driven relationships than in the past, with a focus on securing market control. The Kerr-Carnegie model of reform (Kerr, 1967) offered a solution to how to think about reform and change in higher education. As institutions are diverse and can be harmed by

homogenising them, shifting attention to the institutional level and focusing on development from the past to the present and new futures provides them with the means to establish solutions to develop capacities and adapt to rapid societal change. Implementing change can be challenging but is necessary for organisational growth (Gabay & Voyles, 2022).

Crowther and Green (2004) explore the concept of change management based on the assumption that change can be managed coupled with recognising the importance of knowledge as a resource that can also be managed. They acknowledge the pressures of being able to pivot to accommodate change quickly, but they also observe that change spans management disciplines within an organisation, from operations to marketing and finance to personnel. In the past, issues of fiscal or quality factors influenced change, but this has changed to meet the more sophisticated demands of consumers. Crowther and Green identified three types of change: (1) technological, (2) organisational system, and (3) people-oriented change. Technical and organisational system change is subject to frequent and rapid change. Dealing with people to secure and manage change is more challenging as they often resist change and regard it as a threat, especially if it is sudden. Planning and communicating change is essential to implement change effectively. The causes of change are also explored and identified as economic, social or technological. Economic change results from globalisation and market competition, affecting finance and government at a national level in contrast to social, political and demographic changes, which impact everyone

> during the '60s and '70s, we saw a boom in youth culture and the development of new products and markets to meet the needs of these young, affluent people. During the '80s, we witnessed a change from community to an individual-centred society. During the '90s and early years of the 21st century, we have been witnessing an increasingly ageing population with a consequent change in patterns of demand and purchasing (Crowther and Green, 2004, pp. 180–181).

These changes affect the political climate from state ownership and individualised social benefits to privatisation and the onus on people to make provisions for their health and pension. While these result from changes in the political climate, they are also a cause of how organisations and businesses need to respond and adapt to change.

The third change Crowther and Green refer to relates to technological causes. New types of jobs and industries have developed while others no longer exist, impacting higher

education, industry, financial services, product development, goods, and services. An analysis of several organisational theorists outlines their contextual contributions to organisational change ((Sperlinger, Mc Lellan & Pettigrew, 2018).  It has led Crowther and Green to conclude that successful change is crucial to all organisations. While knowledge management is essential to developing new knowledge, most importantly, an organisation's process of control to implement change must be knowledge-based, codified, and created.

Rowley et al. (2001) express the belief that institutes of higher education can effectively engage in strategic planning processes (previously the reserve of business and industry) to lead them to be prepared for strategic management opportunities and engage in proactive planning to meet their critical role and be responsive in a constantly changing world. Seven factors of consideration explain (1) the need to recognise a move from the industrial age to the information age and an emphasis on occupational training programmes; (2) address the needs of society as severe economic and competitive restraints inform it; (3) engage in strategic planning through meaningful participation where the mission is the result of planning rather than planning being the result of the mission; (4) acknowledge that there is no one method for all institutions; (5) recognise planning as an individual process based on institutional and environmental characteristics; (6) it is a formal iterative method with clear pathways; and (7) it needs to be a continuing process and has to be subject to ongoing evaluation.

 Clark (2004) observed that many universities could not keep up with the demand for change and develop flexible capabilities to merge their traditional role of old and new and implement change while retaining continuity in a sustainable form to meet rapidly changing societal needs. He cites a need for "*pathways* of change" to become sustainable "*patterns* of change" (p. 1). Clark's research focussed on approaching universities that had changed their character by concentrating on practice rather than theory.  Using a bottom-up approach to examine how change was implemented from the inside out, he found that change typically occurred in a cumulative incremental way over time and embedding change in this way led to a qualitative shift in organisational character. However, sustaining change depends on a "steady state" that pushes for change, including a "bureaucracy of change." In a later research paper, Clarke (2013) illustrated a developed framework summarising an approach to change in higher education, reiterating the need for a firm understanding of the work practices and culture to implement change.

Schein (2010) developed a method to explain organisational culture to clarify the concept of culture and how it impacts an organisation. He observed that culture is a continuous change process, an interrelated pattern of assumptions on human relationships, time, humanity's nature, and truth. Schein reflects that recognising how organisational culture shapes behaviour is challenging as culture is not "a visible, constant or an equally shared phenomenon".

Meister-Scheytt and Scheytt (2005) observed that adapting and managing change is essential at all higher education levels and is a challenge, often imposed in response to fiscal pressure. The historical implications on staff from management to implementing change must also be considered to avoid jeopardising the implicit psychological employee control that balances fairness between what is expected from staff and how they are treated. Communication is vital to the success of any change initiative (McCaffery, 2010). In addition to communication being a key component, change agents who champion, and lead change should have spheres of influence that cross institutional boundaries.

Gabay et al. (2022) outline five strategies for facilitating positive change in higher education: (1) understanding the organizational culture, which involves examining various aspects such as generational cohorts, diversity, worldviews, belief systems, and values to gain insights into the organizational culture; (2) addressing resistance: It is crucial to engage everyone in the change process and establish effective communication channels to address resistance effectively; (3) promoting collaborative learning: Encouraging collaboration and knowledge sharing supports the adoption of new behaviours and ways of thinking; (4) Fostering shared leadership: Identifying and acknowledging champions, change-makers, and innovators within the institution while also nurturing leadership qualities in others; (5) sustaining change efforts: Creating practice communities and offering training or coaching programs for managers and leaders helps maintain momentum and facilitate ongoing change initiatives. The AFUGN members' activities reflect this approach, which was discussed in greater detail in the survey analysis.

Herbst (1999) equates change management with a problem-solving journey of three stages: (1) identifying the current landscape, (2) where one wants to go, and (3) planning the route. He identifies peer review, benchmarking, and strategic planning as processes of the journey. Reviewing implementation and measuring the impact of being an AFUC is a

newly emerging area of investigation as the AFUGN grows (Cannon et al., 2021; Clark & Leedahl, 2019; Lim et al., 2021; Simon et al., 2022; Silverstein et al., 2019b;).

Rowley et al. (2001) posed eight strategic questions to inform change from different aspects – an institution's management perspective or in response to pressures from the external environment.

**Table 3.4. Strategic Questions to Inform Change (Rowley, Lujan and Dolence, 2001)**

| | |
|---|---|
| 1. Who will our students be? | Identify the consumer mix over 20 years. Students are likely to be older, more diverse, globally oriented and reflective of employer needs. |
| 2. What should we teach? | An older, diverse student cohort will bring a richer experience to the classroom; therefore, the academy's core must change to become more specialised, raising questions about the breadth of offerings or focusing on niche specialities. |
| 3. How should we teach? | Advances in technology have changed and will continue to change how we teach. Traditional lecturing modes are not always the best way to transfer knowledge. New modes of instruction and learning which reflect the world need to be provided. |
| 4. How will students learn? | Deliver multimodal learning by harnessing technology, group techniques, and assessment. Develop experiential learning that allows students to learn in different environments. |
| 5. What are society's needs? | It leads to questioning the context of a university. Lifelong learning will need a closer connection to learning facilitators who can serve as a gateway to providing opportunities throughout life. |
| 6. How does society expect us to meet its needs? | External expectations of a university as a knowledge repository make it possible for the sector to take the lead in defining what it offers. Institutions need to understand the environment and align with it by conducting a critical analysis of the needs of society and the capacity of an institution to meet those needs. |

| 7. What role will learning play? | Learning will be the primary means by which individuals will succeed in society. |
|---|---|
| 8. How will we pay for it? | As educational demands shift, universities must look beyond the traditional student cohort and actively pursue new finance models, such as older students and lifelong learning. |

Rowley (2001) emphasises the need for universities to be more responsive to the challenges and needs of society. It gives them a better understanding and ability to map a course more likely to succeed and emphasises their expertise, strengths, and capabilities. The traditionally held view of universities as gatekeepers of knowledge is challenged through technology as students are no longer "passive receptacles" (Rowley). The demands on higher education to challenge the traditional paradigms should start with universities making a political assessment of campus culture and moving the institution from "defence of a status quo position" to progressively defining quality. Exploring and changing constructively, examining structures and engaging in pioneering actions to meet the demands of society will determine an appropriate direction towards a future in which universities flourish.

## 3.11   Conclusion

This chapter aimed to highlight and coalesce the breadth of literature on ageing and bring an understanding of broader age-friendly terms and their relevance to higher education. It explored the historical factors relating to ageing, focused on the need to increase age-inclusivity in higher education to widen participation, and explored how universities could bring their expertise to the ageing sector to deal with some of the implications of demographic change.  It introduced the Ten Principles of an AFU and presented supporting evidence for their implementation and interpretation in higher education. It considered literature supporting the Ten Principles of an AFU and broader national and international age-related policies. It examined the language and cultural importance of ageing. It highlighted the historical role of universities and investigated the need to meet societal demand, diversify revenue streams and attract new cohorts of students. It examined the role of universities and the need to introduce change. Finally, this chapter introduced Lawton and Nahemow's (1973) ecology of ageing and its relevance to this study.

# Chapter 4: Methodology

*Research is formalised curiosity. It is poking and prying with a purpose* – **Zora Neale Hurston.**

## 4.1     Introduction

Research methodology determines "how the researcher thinks about a study, how they make decisions about a study and how they position themselves to engage firstly with the participants and with the data generated/collected" (Mills & Birks, 2014, p. 27).  Carter and Little (2007, p. 1318) describe a researcher as "someone who sits outside the methods and describes, explains, justifies, evaluates and helps us understand them."

The previous chapters provided a framework for this study's purpose and importance. The second and third chapters established the context and contained a focused literature review of the study. This chapter outlines the research approach, design, and methods used in this study and explains why these methods were used to analyse the data. Kumar (2011) determines that research is more than a skill set; it is a way of thinking and critically examining the aspects of a question, theory or practice to advance new thinking and implement change. There are several ways to approach research questions, from informal to strictly scientific.

## 4.2     The Research Problem

A significant and growing body of literature has sought to establish age-friendliness (e.g., cities, businesses, housing, hospitals, healthcare, transportation, and communities). It has ignited a global network of collaboration in defining models of good practice (Bruce et al., 2014; Gibney et al., 2018; Huang et al., 2011; Lee et al., 2017; Luciano et al., 2020; WHO, 2017). However, the term Age-Friendly University (AFU) is a new concept with a genesis in Dublin City University, which developed the Ten Principles of an AFU. Arizona State University and the University of Strathclyde were the first to adopt the Principles, which contributed to establishing an Age-Friendly University Global Network (AFUGN).

## 4.3    Research Aim

This research explores the factors and processes influencing becoming and remaining an AFU. There are recommendations on how to join the AFUGN; however, no defined or prescribed way outlines the process and factors of consideration to become an AFU before joining the global network. There is scant literature and little documentation on how AFU members have approached joining the AFUGN or the factors influencing their decision to join. Also, the AFU concept is open to interpretation on how it is implemented. This research is especially needed because the AFUGN is rapidly growing. This study aims to address this research gap.

## 4.4    Research Questions

Kumar (2011, p. 44) describes research questions as "any questions you want to be answered and any assumption or assertion that you want to challenge or investigate.". Formulating the research question is an essential part of the research journey and is the foundation of the study. How the research questions are posed determines how the research will be conducted. This research study examines:

1.  What were the factors influencing the decision to become and remain an AFU?
2.  What were the university's processes for establishing itself as an AFU?
3.  How did universities interpret and apply the Ten Principles of an AFU?

## 4.5    Purpose of the Research

This research will provide higher education institutions with insights into the factors and processes involved in becoming an Age-Friendly University (AFU). It will examine the influencing factors of consideration when deciding to become an AFU and explore the process. It will also investigate how the Ten Principles of an AFU are interpreted and implemented. The research findings will inform the AFUGN members on improving their implementation of the Ten Principles of an AFU.

## 4.6    Methodology Framework

Although the benefits of using a methodological framework are increasingly recognised, there is no formal definition of what constitutes a framework (Cruz Rivera et al., 2017).

Meekin et al. (2020) define a methodological framework as a "structured guide to completing a process or procedure". Their study examined terminology and approaches to developing a methodology framework, mapping its existing use, and suggested developing future methodological frameworks. They concluded that methodological frameworks could improve the robustness, consistency, and reporting of activity, enhance the quality of the research, standardise approaches, and maximise the findings' trustworthiness. Figure 4.1 below illustrates the methodological framework developed for this study.
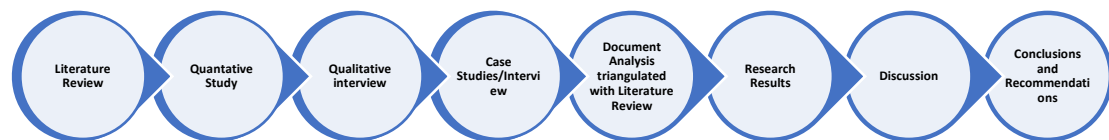


**Figure 4.1. Methodology Framework**

## 4.7    Methodology Stages

The literature review provided evidence to support the perspectives of the research topic and examined ageing in a broader context. It explored the background of the evolution of the AFCP and the thematic approach to ageing. It also mapped the Ten Principles of an AFU to the literature supporting scholarly input on ageing, lifelong and intergenerational learning, technology, retirement and research.

### 4.7.1    Saunders's Research Onion

Saunder et al.'s (2007) Research Onion provides a research design and plan structure. They define six consideration areas: the research philosophy, approach, strategy, choices, time horizon, techniques, and procedures. The onion (illustrated below in Figure 4.2) shows the stages of the research development as each layer describes the various stages of a research process. It outlines an effective progression through which a research methodology can be designed as its adaptability makes it suitable for many types of research methodology and outlines the steps of the research process (Bryman, 2010).

**Research philosophy**

**Research approach**

**Methodological choice**

**Research strategy**

**Time horizon**

**Data collection and analysis**

Positivism

Inductive

Critical realism

Qualitative

Experimental

Survey

Deductive

Interpretivism

Case study

Cross-sectional

Mixed methods

Ethnography

Narrative

Longitudinal

Grounded theory

Abductive

Postmodernism

Action research

Quantitative

Archival research

Pragmatism

**Figure 4.2. The Research Onion (Saunders M, Lewis P and Thornhill, 2007)**

### 4.7.2. *Philosophical Position and Orientation*

Research philosophy forms the foundation of all studies, rooted in ontological and epistemological perspectives. This study adopts a combined positivist and interpretivist paradigm (Guba et al., 1994), reflecting fundamental beliefs guiding the research process (Coleman & Briggs, 2020). Ontological considerations explore the nature of reality, while epistemological perspectives examine the sources and limits of knowledge (Patton, 2002). In positivism, reality is assumed to exist objectively and is governed by consistent natural laws (Guba & Lincoln, 1994). Positivist researchers seek universal laws and objective accounts of the world (Punch, 2013), treating participants as research objects and accepting only empirically verifiable knowledge. For this study, a combined quantitative and qualitative approach is deemed appropriate to both quantify specific facts about the AFUGN and explore them in greater depth.

Positivism, as a scientific research method, employs surveys and questionnaires to measure group pathology, aligning with quantitative analysis. It emphasises empirical analytic inquiry, treating individuals as objects of study. Quantitative analysis facilitates operational definitions and replicability. However, critics argue that it overlooks human interaction (Hathaway, 1995) and sacrifices researcher egalitarianism (Abraham, 1996). Majeed

(2020) notes that it undermines agency, creativity, and reflexivity, limiting its suitability for theory creation.

Interpretivism, conversely, emphasises the social and cultural influences on individuals' thoughts and ideas (Crotty, 1998), recognising researchers as part of the research topic (Coleman & Briggs, 2020). It adopts a qualitative approach, exploring participants' perspectives to understand phenomena holistically. Contrary to misconceptions, qualitative research offers credibility and depth in specific contexts (Schulze, 2003). It is an inductive method that acknowledges multiple realities and focuses on understanding meaning within natural settings (Denzin & Lincoln, 2005).

Pragmatism is a practical research approach that acknowledges knowledge as open to interpretation and questioning (Goldkuhl, 2012). It is flexible, not committed to one philosophy, and can be adapted to meet the researcher's needs, making the philosophical focus of the research less critical than the outcomes.

### 4.7.3 Quantitative Vs Qualitative Approach

Quantitative and qualitative research differ in data nature, collection, and analysis methods (Punch, 2013). Both can serve descriptive, exploratory, and explanatory purposes (Miles & Huberman, 1994). Researchers should understand the strengths and weaknesses of each approach and select based on the analysis of the situation. Mixed methods, a pragmatic approach, involves selecting feasible methods (Johnson & Christensen, 2011). Quantitative research focuses on variables and relationships, while qualitative research emphasises context and process (Passen, 2022). Integrating both approaches enhances understanding by leveraging their strengths and acknowledging their place in research methodologies (Schulze, 2003).

### 4.7.4 Ontological and Epistemological Stances

An epistemological perspective is vital in research for clarifying elements such as design, data collection, and interpretation (Easterby-Smith et al., 2018). Research philosophy aids in aligning research objectives with chosen approaches and methods (Biesta, 2007). This study adopts a combined positivist and interpretivist paradigm, primarily qualitative, to

engage directly with AFUGN members, enabling broad quantitative data collection and in-depth exploration of relevant knowledge and theories.

## 4.8 Research Approach

Three research theory approaches exist: inductive, deductive, and abductive (Saunders et al., 2015). They guide data collection and analysis decisions. Induction involves moving from specific to general levels of abstraction (Punch, 2013), which is relevant when little existing knowledge of the research focus exists. Inductive research starts with a question, collects empirical data, and generates hypotheses and theories, often in qualitative studies.

### 4.8.1 Deductive Approach

A deductive approach starts with existing theory and builds on it through research, relying on a pre-existing body of knowledge. Quantitative analysis reflects this approach, used to test theories. Quantitative researchers focus on statistical generalisations, while qualitative researchers make analytical generalisations (Johnson & Onwuegbuzie, 2004).

### 4.8.2 Abductive Approach

Ward (2016) discusses an abductive method, where evaluating mature theories involves assessing their explanatory power, coherence, and empirical support. This process resembles inference to the best explanation, commonly used in scientific reasoning. For this study, a mixed-methods approach, as illustrated below in Figure 4.3, with an inductive orientation and descriptive statistics is chosen to build broad themes from the data to general theories (Ward, 2016
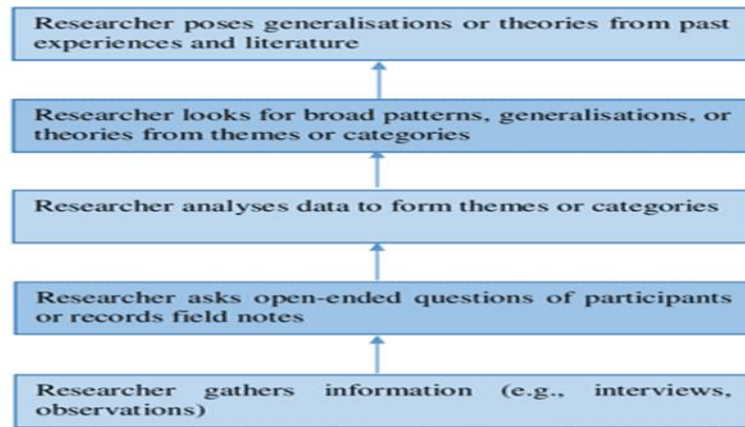
**Figure 4.3. The inductive logic of research in a qualitative study Creswell, (2009, p.63**

### 4.9    Methodological Choice

Kumar (2011) asserts that for a process to be called research, it should have the following characteristics, which can be examined from three different perspectives:

1.  Applications of the findings of the research study.
2.  Objectives of the research study.
3.  Mode of enquiry used in conducting the study.

Kumar distinguishes between pure and applied research, where pure research focuses on methodology development and adding to existing knowledge, while applied research aims to understand or use findings for practical purposes (Kumar, p. 30). Two modes of inquiry exist: structured and unstructured. A structured approach, akin to quantitative research, has predetermined objectives and designs. In contrast, an unstructured approach, akin to qualitative research, allows flexibility to explore phenomena holistically (Creswell & Clarke, 2007). The choice of method and approach hinges on whether information is predetermined or allowed to emerge from participants.
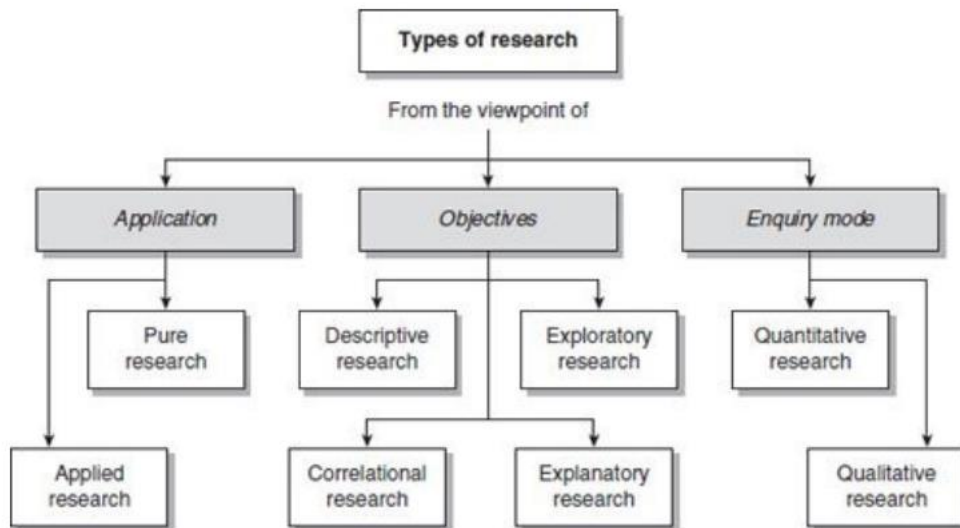
**Figure 4.4. Types of Research (Kumar, 2011, p. 9)**

Apart from qualitative and quantitative research, a mixed-methods approach provides flexibility by incorporating both data types, offering pragmatic knowledge claims (Creswell & Clarke, 2007). It begins with a broad overview to generalise results and then focuses on detailed qualitative research to capture participant views. This research adopted a mixed-methods design because it is practical when a quantitative or qualitative approach alone cannot lead to understanding a research problem. Mixed methods allow researchers to be creative if the design aligns with the research question (Johnson & Christensen, 2011), with steps outlined in Figure 4.5 below for guidance.
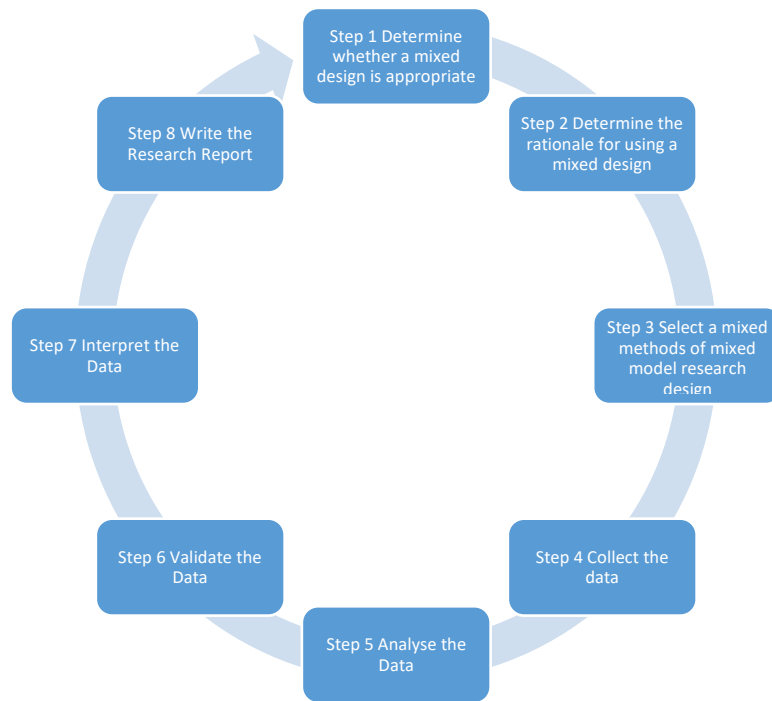
**Figure 4.5. Steps in a Mixed Method Research Study (Johnson & Christensen, 2011, p. 422)**

In a mixed methods approach, two relevant dimensions for data consideration are time orientation and paradigm emphasis. Time orientation refers to whether qualitative and quantitative methods occur simultaneously or sequentially. Paradigm consideration relates to whether both data types are equally emphasised or if one paradigm is dominant in answering the research question and interpreting the results. These dimensions are depicted in Figure 4.6.

## Time order decision
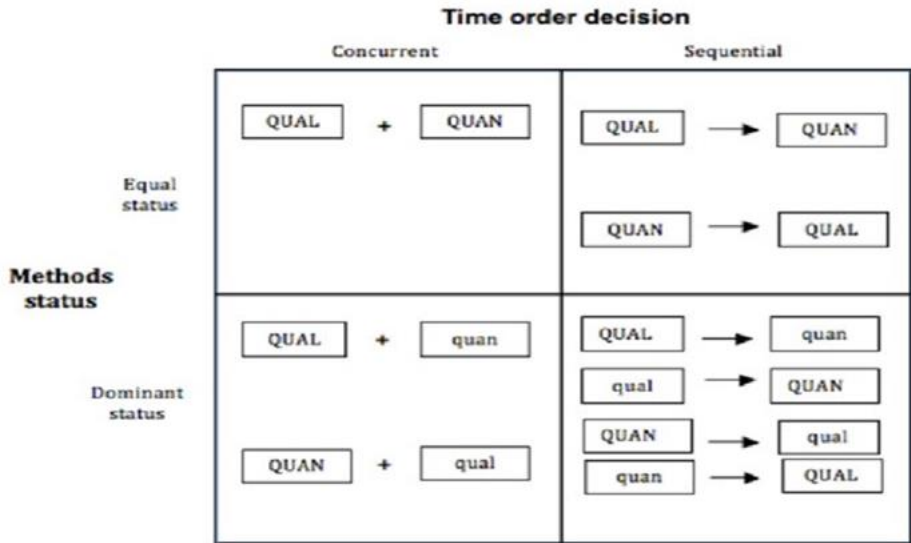


**Figure 4.6. Mixed Method Design Matrix Morse p.122 in Creswell, 1991**

Johnson and Christensen highlight two key questions for initiating a mixed-method study: prioritising the qualitative or quantitative paradigm and conducting the components concurrently or sequentially. They recommend using Greene et al.'s (1989) framework, which outlines five general purposes for mixed-method studies: triangulation, complementarity, development, initiation, and expansion. Table 4.1 presents a list of goals for mixed methods research. Adopting this framework from the outset enables researchers to tailor the design.

**Table 4.1. List of Purposes for Mixed Research Johnson and Christensen (2011, p. 423) based on the model by Green et al. (1989)**

| | |
|---|---|
| **Triangulation** | Seeks convergence, corroboration, and correspondence of results from different methods. |
| **Complementarity** | Seeks elaboration, enhancement, illustration, and clarification of the results from one method with the results from the other method. |
| **Development** | Seeks to use the results from one method to help develop or inform the other method, where development is broadly construed to include sampling and implementation, as well as measurement decisions. |
| **Initiation** | Seeks the discovery of paradox and contradiction, new perspectives of frameworks, the recasting of questions or results from one method with questions or results from the other. |
| **Expansion** | Seeks to extend the breadth and range of enquiry by using different methods for different components. |

Quantitative and qualitative research strengths offer the best understanding of the research approach (Creswell & Creswell, 2003). Coleman (2020) warns about the potential pitfalls of a mixed-methods approach, emphasising the importance of researchers being aware of their philosophical preferences. Each research approach brings a unique perspective, influenced by various factors such as social ideologies and researcher assumptions about the world (Hathaway, 1995). However, this approach suits the research study well, leveraging credibility and rapport with AFUGN members. It allows for an emergent research process, aligning with Creswell's (2013) emphasis on an inductive style and focus on individual meaning and situational complexity appropriately or adjust it based on early findings or new insights.

**Table 4.2. Illustrates Qualitative, Quantitative, and Mixed Methods Approaches and how these three elements combine into a research design (Creswell, 2009)**

| Tend To or Typically | Qualitative Approaches | Quantitative Approaches | Mixed-Method Approaches |
|---|---|---|---|
| • Use these philosophical assumptions.<br>• Employ these strategies of enquiry. | • Constructivist/Transformative knowledge claims.<br>• Phenomenology, grounded theory, ethnography, case study and narrative. | • Positivist knowledge claims.<br>• Surveys and experiments. | • Pragmatic knowledge claims.<br>• Sequential, convergent and transformative. |
| • Employ these methods. | • Open-ended questions, emerging approaches, text or image data. | • Closed-ended questions, predetermined approaches, numerical data (may include some open-ended questions). | • Both open and closed-ended questions, both emerging and predetermined approaches and both quantitative and qualitative data and analysis. |
| • Use these practices of research as the researcher. | • Positions himself or herself.<br>• Collects participants meaning.<br>• Focuses on a single concept or phenomenon.<br>• Brings personal value into the study.<br>• Study the context or setting of participants. | • Tests or verifies theories or explanations.<br>• Identifies variables to study.<br>• Relates variables in questions or hypothesis.<br>• Uses standards of validity and reliability.<br>• Observes and measure information numerically.<br>• Uses unbiased approaches.<br>• Employs statistical procedures. | • Collects both quantitative and qualitative data.<br>• Develops a rationale for mixing.<br>• Integrates the data at different stages of enquiry.<br>• Presents visual pictures of the procedures in the study. |

| Tend To or Typically | Qualitative Approaches | Quantitative Approaches | Mixed-Method Approaches |
|---|---|---|---|
| | • Validates the accuracy of findings.<br>• Makes interpretation of the data.<br>• Creates an agenda for change or reform.<br>• Collaborates with the participants.<br>• Employs text analysis procedures. | | • Employs the practices of both quantitative and qualitative research. |

### 4.9.1   Research Strategy

This study adopts a mixed methods approach and uses a survey to gather mainly quantitative descriptive data, followed by an exploration of AFU practices in two international sites.

The online survey of the AFUGN membership offered preliminary information about AFU practices.  It was chosen because it offers a flexible approach to studying various basic and applied research questions. The survey used a deductive approach, while the case studies used an inductive framework. The theory explains why and how variables are related and acts as a bridge between them (Creswell, 2009).

Johnson and Christensen (2011) highlight the advantages of surveys and correlational surveys for understanding population characteristics, such as voter attitudes or opinions about candidates. Surveys are cost-effective and can be conducted on a large scale, allowing respondents to be more candid due to anonymity. Ponto (2015) suggests that providing additional information about survey design and conduct aids readers in concluding the study's validity. Surveys were chosen for their flexibility in addressing various research questions. To achieve research objectives, questions covered general and specific behaviours regarding the institution and implementing the Ten Principles. Survey data, yielding descriptive statistics, were analysed alongside two case studies to provide deeper insights.

A case study aims to capture the complexity of a single case and understand its activity within important circumstances (Stake, 1995). It is utilised across various fields, including policy, political science, public administration, community psychology, sociology, organisational and management studies, planning, and academia (Yin, 2002). Case studies are predominantly qualitative but may incorporate quantitative elements, linking interpretative paradigms, phenomenological approaches, and constructivism (Stake, 1995). They retain the holistic and meaningful characteristics of real-life events. Case study research encompasses exploratory, descriptive, or explanatory elements, often overlapping (Yin, 2002). When selecting a case study approach, researchers consider the type of research, their control over behavioural events, and the focus on contemporary rather than historical issues (Yin, 2002).

**Table 4.3. Relevant situations for different research strategies (Yin, 2002, p. 17)**

| Strategy | Form of Research Question | Requires Control Over Behavioural Events | Focus on Contemporary Events |
|---|---|---|---|
| Experiment | how, why | Yes | Yes |
| Survey | who, what, where, how many, how much | No | Yes |
| Archival Analysis | who, what, where, how many, how much | No | Yes/No |
| History | how, why | No | No |
| Case study | how, why | No | No |

Yin delineates research strategies by explaining the distinctions between exploratory, descriptive, and explanatory approaches. Exploratory research can utilise any of the five strategies, while questions pertaining to "what," "how many," or "how much" are suited to survey or archival analysis. Often used in case studies, descriptive strategies can serve exploratory and explanatory purposes. Explanatory analysis focuses on "how" and "why" questions, favouring case studies, histories, and experiments. Case studies are preferred for examining contemporary events, but they rely on historical data when manipulating behaviours is not feasible. An overview of the case study should include background information and establish the purpose and rationale for the study. As advocated by Stake (1995), an intrinsic case study approach allows the case to reveal its own story, capturing the uniqueness of the investigated phenomenon. This research adopts an intrinsic case study approach for its fluidity and flexibility in conducting in-depth studies and descriptive analyses.

The case studies were chosen primarily based on geographical location, as cultural beliefs in each continent vary. As the AFCP and AFUGN are at varying stages globally, the culture and environment of each inquiry setting are relevant to the research. Dimmock et al. (2000, p. 21) define culture as "the enduring set of beliefs, values and ideologies

underpinning school structure, process and practices." Coleman (2020) emphasises the value of societal culture as an analytical concept in situations where the characteristics of institutions appear initially to be similar but are different at an operational level. Values, relationships and processes impact organisational structures, leadership, and hierarchies. Although different societies adopt the same policy agenda and framework, their interpretation of the core concept may differ. A framework developed by Dimmock et al. (2000) identifies four elements that comprise an educational institution: Organisational structure, Leadership and management processes, Curriculum and Teaching and Learning.

This framework identifies generic dimensions in all cultures that differ by degree. The cross-cultural approach to the research question can be defined by administering the research instruments. The case study approach will comprise semi-structured interviews and document analysis to complement the case studies.

## 4.10    Research Methods

Carter (2007) emphasises that researchers' methodological and epistemic choices shape a research method, clarifying that methodology and methods should not be confused as they are often used interchangeably. A method is a technique used to collect data (Mills & Birks, 2014). The research employed a mixed approach, combining a quantitative survey, semi-structured interviews, and document analysis.

The quantitative online survey, conducted via Survey Monkey, consisted of twenty-five questions regarding factors influencing joining the AFUGN and interpreting the Ten Principles. Survey data were analysed using IBM SPSS for comparative analysis.

Semi-structured interviews allow for spontaneous probing into facts or issues raised during the interview (Kumar, 2011). They are commonly used in qualitative data collection to describe, integrate into narratives, and contribute to logical sequences. While offering flexibility, interviewers must remain attentive to verbal and non-verbal cues, ensuring active yet non-intrusive engagement (Bryman, 2010).

Document analysis involves systematically reviewing printed and electronic documents, including advertisements, meeting agendas and minutes, manuals, books, diaries, newspapers, surveys, and public records (Bowen, 2009). Documents serve as substitutes for unobservable activities (Stake, 1995), providing primary evidence for qualitative

research (Bassey, 1999; Gillham, 2000; Yin, 2002). Despite the scarcity of documents from one university in the case study, I identified sufficient documents to inform part of the inquiry strategy.

Amid the COVID-19 pandemic, interviews were conducted via Zoom due to its extensive potential as a research tool. Zoom facilitated interviews with geographically dispersed AFUs, providing recorded interactions that closely resemble face-to-face interactions. Despite some drawbacks, the benefits of using Zoom for collecting qualitative data have been positively reported (Archibald et al., 2019). However, while Zoom is a valuable tool for researching people online, several criticisms more broadly highlight potential limitations and challenges associated with this method (Stewart and Williams, 2005). These are outlined below:

- **Sampling Bias**

Participants can suffer from sampling bias, as participants are often self-selected and may not represent the broader population. Individuals who are comfortable with technology, have access to reliable internet, and are available during the scheduled times are more likely to participate, potentially excluding marginalised or less tech-savvy groups.

- **Limited Depth of Interaction**

The absence of physical presence in online focus groups can lead to a lack of rich interaction. Non-verbal cues, such as body language and facial expressions, are less visible or completely absent, limiting the moderator's ability to fully gauge participant reactions and emotions. This can reduce the depth and quality of the data collected.

- **Technical Issues and Accessibility**

Participants may face technical difficulties, such as poor internet connections, unfamiliarity with the technology, or hardware issues, which can disrupt the flow of discussion and result in incomplete data. Additionally, participants with disabilities or those who are less comfortable with digital communication may find it challenging to engage fully.

- **Reduced Participant Engagement**

Maintaining participant engagement can be more difficult in an online setting. Distractions in the participant's environment, the impersonal nature of digital communication, and the ease of disengagement (e.g., turning off the camera or muting the microphone) can lead to lower levels of participation and less insightful responses.

- **Data Security and Privacy Concerns**

Conducting focus groups online raises significant concerns about data security and privacy. It is crucial to ensure that the platforms used are secure and that data is protected. However, breaches or misuse of data can still occur, potentially compromising participant confidentiality.

- **Moderation Challenges**

Moderating an online focus group requires different skills compared to face-to-face settings. Moderators must be adept at managing technology, keeping participants engaged, and fostering a conversational flow without the benefit of physical cues. This can be challenging, especially when dealing with larger groups or sensitive topics.

- **Lack of Contextual Understanding**

In online settings, researchers might miss contextual factors that could influence participant responses, such as the environment they are participating in or subtle social dynamics more apparent in face-to-face interactions.

- **Ethical and Informed Consent Issues**

Ensuring that participants fully understand the nature of the study, the use of their data, and the implications of their participation can be more challenging online. Obtaining informed consent meaningfully requires careful consideration, and participants may not always appreciate the potential risks involved in online data sharing.

While online focus groups offer flexibility and can reach a broader demographic, these criticisms highlight the importance of careful planning and consideration of the method's limitations. Researchers must be aware of these potential pitfalls and take steps to mitigate

them, such as employing skilled moderators, using secure platforms, and being vigilant about ethical considerations. Despite these challenges, using online tools to conduct interviews and focus groups for research remain valuable when used appropriately and with an understanding of their inherent limitations.

### 4.10.1  Time Horizon

Saunders et al. (2015) discuss two sections in this layer of the research onion: cross-sectional and longitudinal time horizons, which determine the frequency of data collection. In a cross-sectional design, data is collected at a single point in time, allowing examination of variations and comparisons of variables. However, it does not allow for manipulating variables or drawing causal inferences, thus lacking internal validity. Nevertheless, combining cross-sectional surveys with qualitative research can enhance relevance (Bryman, 2010). On the other hand, a longitudinal approach involves observing events over time, facilitating causal inferences (Bryman, 2010). Due to the limitations of completing the Doctorate in Education, this research project adopts a cross-sectional approach.

### 4.10.2  Data Sampling

Data sampling allows researchers to ask participants targeted questions and work with a manageable amount of data about a statistical population to produce accurate findings and gather richer data (Bryman, 2010; Ponto, 2015)

The research started with a single-stage survey containing 25 questions. It was a census survey of the AFUGN members directed explicitly to the institutional representatives of all 83 members of the AFU. This census-size survey had 45 responses out of 83, representing a 54.21% response rate deemed representative and statistically valid.

The second stage of the research employs purposive, non-random sampling to select two case studies, aiming to validate and provide deeper insights into survey findings. Purposive sampling involves the researcher selecting cases based on specific characteristics of interest (Johnson & Christensen, 2011), offering additional verification, and focusing on data-rich cases to complement survey analysis. This study selected cases based on their continental location and duration of AFUGN membership.  One was based in Canada, and

the other in the Czech Republic.  The Canadian institution joined in 2017, and the Czech institution in 2021. These locations offer diverse perspectives on age-friendly practices in higher education, reflecting varied cultural, social, and institutional contexts.  Examining the factors and implementation of the Ten Principles of an Age-Friendly University (AFU), the study explored how each institution tailored these principles to its unique context. By analysing the strategies employed by both institutions, the study aims to uncover how cultural, social, and institutional factors influence the decision to join the AFU. This approach generates insights that can inform AFU membership globally.

Despite limitations, purposive sampling was chosen to identify trends, attitudes, and behaviours across the AFUGN population. The case studies shed light on diverse interpretations of the Ten Principles within different socio-economic and cultural contexts of AFU membership (Palinkas et al., 2015).

## 4.11    Data Collection Approaches

Data were collected from an online survey using Survey Monkey, which comprised 25 questions (Appendix III) and two case studies comprising semi-structured interviews (Appendix IV). Respondents are those responsible for their institution's AFU programme.

Twenty-five questions offered multiple-choice, Likert scale, open and closed questions, and limited qualitative responses where respondents could elaborate in free text. I chose predominantly closed questions with multiple choices to encourage survey completion, which would not be time-consuming for participants. This design strategy was also selected to support participants in answering the survey independently and to ensure enough detail and explanations of each question for participants to answer. The survey took an average of 11.6 minutes to complete. Questions were primarily quantitative, containing both nominal and ordinal questions. Questions 1 – 4 and beyond posed questions of a general nature about the institution. They moved on to questions about more specific aspects of the institutional approach to the factors and process of becoming an AFU.

Phase 2 of the research focused on two case studies and a combined document analysis (Appendix V). Key research questions from the survey were reflected in the case studies to facilitate cross-analysis between the survey and case studies responses. The case study

interview questions were predominantly open. They followed a semi-structured approach to allow the participants to elaborate on each answer, which allowed me to maintain the focus of the interview and prevent the conversation from going off-topic.

The document analysis examined each institution's strategic plan, relevant minutes of meetings relating to the AFU, internal PowerPoint presentations, the original application document to become an AFU member, internal institutional minutes of meetings, digital and print advertising, promotional material, press releases, and social media.

### 4.11.1  Implementing the Online Survey

A merging data collection approach based on technology is a cost-effective survey alternative. Respondents can answer at a time suitable to them, and they can take as much time as they need or respond in multiple sessions. The respondents could only take the survey once, even if they did it over a period of time. Regmi et al. (2016) identified six methodological components critical to online surveys: user-friendly design and layout, selecting survey participants, avoiding multiple responses, data management, ethical issues, and piloting tools. Carbonaro et al. (2002) cite the advantages of using online surveys to conduct research. Benefits include posing the questions in various forms, which can be quickly processed and collated; graphics can be more easily generated on the data; and the data processing is immediate.  Questions can be filtered to ensure data integrity, such as missing data or failure to complete subsections of the survey instrument. While data integrity is an advantage, it is also valid to allow respondents to opt out of answering some items on the survey, thus respecting the privacy of the individuals who may not or may choose not to answer some of the questions.

Phase 1 of this study utilised Survey Monkey to ask the questions. Survey Monkey is a cloud-based survey tool that helps users create, send, and analyse surveys. This method was chosen because it allows research questions to span three categories – close-ended, open-ended, and descriptive. It can include logic options so that a "NO" answer moves the respondent onto the next question.  It can ask single answers, multiple-choice with multiple answers, a rating scale, and three matrix-type questions in the close-ended category. It also allows answer choice randomisation, presents a survey completion bar, adds auto-numbered pages, provides options to make questions require answers to proceed, and controls data input by validation. A survey can be drafted, edited, and trialled at a

fundamental level to ensure the correct logic and questionnaire response types are in place (Ponto, 2015; Waclawski, 2012). Although there are risks, for example, starting a survey with the wrong logic options or the possibility that email requests may be ignored, it was chosen as it is relatively easy to use and can generate access to multiple custom reports, response downloads, custom chart creation, download functionality, and options to share responses. Other considerations related to the approach included the security aspect for the respondents ("respondent authentication") and the fact that data would be safe from external tampering and stored in an easily read format (Carbonaro et al., 2002). It also presents the opportunity to carry out independent research.

### 4.11.2 Pilot

Before the first phase of the research survey commenced, a pilot survey of 24 questions was sent to five random AFU members to ensure the correct logic and response rates were in place. Pilot studies can help ensure the adequacy and order of the questions, comprehensiveness of the contents, technology feasibility, transfer issues and data compatibility (Regmi et al., 2016). Yin (2002) cites the importance of differentiating between a pilot study and a pre-test. He suggests that a more formative pilot study allows the researcher to elicit suggestions for improvement. Two questions were altered based on pilot responses, and an additional question was added. I used the revised survey for the study.

### 4.11.3 Accessing the Participants

An email outlining the request for participation, a consent form and a single-stage survey were then emailed to the Age-Friendly Champions in each AFU. Subjects were provided with an overview of the research study and an assurance that their anonymity would be maintained. The AFUGN comprises members representing Europe, North America, South America, Southeast Asia, and Australia. The AFUGN has expanded to over 100 members (2023) but numbered 83 institutions in the global network at the time of the research. To get a broad perspective and representative response to discussing influencing factors and process of becoming and remaining an AFU and how the Ten Principles are executed, all 83 member institutions were surveyed. The AFU Champion in each institution was contacted by email and invited to participate in the survey. As the AFU Coordinator, my

role brought several added benefits to the research on the influencing factors and process of becoming an Age-Friendly University (AFU), which included :

**Practical Insight and Expertise** –my direct involvement in implementing and coordinating AFU initiatives provided valuable practical insights that enriched the research. This hands-on experience allowed me to identify real-world challenges and opportunities that theoretical research alone might not reveal.

**Networking and Collaboration**: I established relationships within the institution and with other AFUs and helped gather diverse perspectives and best practices.

**Access to Resources and Data**: As the coordinator, I had access to essential data and resources, such as institutional records, program evaluations, and feedback from older people. This access ensured that the research was grounded in accurate and comprehensive information.

**Leadership and Advocacy**: My leadership role allowed me to advocate for the importance of age-friendly policies and practices within the institution. This advocacy helped align the research objectives with institutional goals and secure the necessary support and resources for the study.

**Implementation Feedback Loop**: My involvement enabled a feedback loop between research and practice. Insights gained from research could be quickly tested and refined through practical application, and the outcomes of these applications could, in turn, inform further research.

**Enhanced Credibility and Influence**: My position lent credibility to the research, making it more likely to be taken seriously by institutional decision-makers. This influence is crucial in promoting the adoption of recommendations derived from the study.

By bridging the gap between theory and practice, my role as AFU Coordinator significantly enhanced the research's relevance, applicability, and impact on becoming an Age-Friendly University.

### 4.11.4 Ease of Questionnaire Completion

The survey was designed in Survey Monkey, comprising a form with radio buttons for use with categorical data and Likert scale items. Short answer items required the respondent to type in an answer. Questions related to each university's cultural, societal, and institutional approaches to the factors, and the implementation and interpretation of the Ten Principles of an AFU (Appendix III). A time bar indicated the time spent on the survey and the remaining questions. The average response time was 11.6 minutes to complete the survey. Upon completion of the survey, when the respondents submitted it, a survey message was generated informing them that the data had been received.

### 4.11.5 Data Processing

Data from the survey were automatically stored and processed in Survey Monkey. There was no record of who completed the survey or where they were located. The website was secure from external threats through various levels of identification, including password and text message verification for the Survey Monkey site.

There were 45 responses out of 83, representing a 54.21% response rate. Each response is 2.22%, and for this analysis discussion, it has been rounded down to 2% per individual response. No-response and non-response items are of concern in survey research as they can result in data bias. The evaluation of the results will consider the non-response rate (Mills & Birks, 2014). Thirty-eight institutions did not respond to the survey.

### 4.11.6 Response Bias

Response bias is the effect of non-response in surveys. Bias examines how the results would have changed if the non-respondents had responded. Non-respondent responses could have changed the overall results (Cresswell, 2009). Eight of the 38 institutions that did not respond were contacted by telephone to check if their responses differed substantially from respondents. Of the eight contacted, six responses were closely aligned with the completed survey respondents, and two were similar. However, their primary rationale for joining the AFUGN was different, as they viewed membership as leverage for senior management to institute new operational practices concerning their retired staff.

The Survey Monkey results were downloaded into Excel spreadsheet software. It is possible to perform rudimentary statistical analysis in Excel; however, this was deemed insufficient for robust analysis. The data were then uploaded to IBM SPSS (Statistical Package for the Social Sciences). It is a powerful statistical analysis tool with built-in data manipulation tools such as re-coding and transforming variables, and it can generate multiple data analysis tests.

A data analysis plan was formulated, delineating the approach for analysing data. Two methods were employed to analyse statistics. Descriptive statistics portray the features of a sample or dataset, encompassing variables like mean, standard deviation, or frequency. Inferential statistics aid in comprehending the aggregate properties of a data sample and its constituents, assisting in drawing conclusions (Appendix VI).

Descriptive statistics combines frequency analysis, which shows the number and percentage of different variable categories (Bryman, 2010) and qualitative analysis. Inferential statistics examined the data and applied chi-square and ANOVA tests. The data set was subject to frequency analysis, which shows the number and percentage of different variable categories (Bryman, 2010). Chi-squared tests establish the relationship between variables. This test calculates the confidence rate of a relationship between two variables and the value or frequency between cells that would occur by chance. It can be meaningfully interpreted with statistical significance. Chi-square tests also depend on the number of categories of the two categories being analysed. Ultimately, chi-square values are affected by the table size and considered for statistical significance (Bryman, 2010).

Analysis of variance (ANOVA) is a statistical test used to analyse the difference between the means of more than two groups. It is an instrument used to evaluate hypotheses based on experimental results. ANOVA can assess the relationship between two variables (Cresswell, 2009).

Pearson's correlation coefficient, computed using SPSS, assesses the statistical relationship between two continuous variables. It's widely regarded as the best method for measuring association between variables due to its basis in the covariance method. This coefficient indicates both the magnitude and direction of the relationship. Consideration of both the computed coefficient size and sample effect is crucial, as highlighted by Bryman (2010).

Statistical significance denotes the level of risk in inferring a relationship between variables in a population sample where none exists.

### *4.11.7 Implementing the Case Study*

Case study research allows a researcher to interact with a respondent directly and is a rich source of information. It enables a researcher to draw out themes relevant to the study (Mills & Birks, 2014). Three scholars, Yin (2002), Merriam (1991) and Stake (1995), are seminal authors who outlined procedures when conducting case study research. Yin's approach has been adapted to provide a roadmap for the case study design, displayed in the following table.

**Table 4.4. Components of Research Design (adapted from Yin, 2002, p. 29)**

| Designing the Case | |
|---|---|
| The subject being studied | Influencing factors and process of becoming and remaining and remaining an AFU. |
| Proposition | How the Ten Principles of an AFU are interpreted and implemented. |
| Unit of Analysis | Two member institutions of the AFUGN |
| Logic linking data to the propositions. | Single case study design<br><br>A case study design is an appropriate response to "capture the circumstances and conditions of an everyday commonplace situation". |
| Criteria for interpreting the findings | Contrasting and interpreting emerging themes using Taguette. |

Following an analysis of the initial applications from AFUGN members and desk research on universities – their location, online promotion, website, press release, and AFU-related advertising, two universities were invited to participate in semi-structured in-depth interviews with some open-ended questions and probes (Appendix IV). An email inviting participation with the questions attached was sent before the interviews were conducted using Zoom.  As a result of the global COVID-19 pandemic, Zoom was the chosen method for interviewing respondents. Key factors influencing this decision were improved internet access, the use of electronic devices globally, and the convenience and cost-effectiveness of conducting interviews with respondents over a sizeable geographical spread.  As technology advances, there is an increased understanding that online methods complement

traditional data-gathering methods (Archibald et al., 2019). Zoom is a cloud-based video conferencing tool that facilitates online meetings, group messaging, whiteboard discussions, breakouts, captioning, and note-taking in real-time, connecting geographically remote individuals. An advantage of Zoom is its ability to record and store sessions without third-party involvement. It also provides enhanced security features like user encryption, cloud backup, and collaboration data sharing. Each interview, lasting one hour, was recorded, transcribed, and shared with respondents for corrections.

## 4.12    Document Analysis

Document analysis systematically reviews or evaluates documents to provide context, track changes over time, generate questions and corroborate other data sources (Bowen, 2009). In this study, the four-step READ approach to document analysis has been followed: (1) ready the materials; (2) extract the data; (3) analyse the data; and (4) distil the findings (Dalglish et al., 2020). Triangulation is a quality assurance tactic that cross-validates and examines the converging evidence to make findings as robust and rigorous as possible (Bardach & Patashnick, 2016). Stake (1995) recommends triangulation to ensure that case study research is based on a disciplined approach and "not simply a matter of intuition, good intention and common sense" (p. 107). To complement and triangulate the case study, I conducted a document analysis in tangent with the interviews to review the approach taken by each institution to increase the trustworthiness of the data ( Merriam, 2015; Morgan, 2022). Document analysis is a systematic procedure for reviewing and evaluating documents to elicit understanding and knowledge (Bowen, 2009), including printed and electronic documents (e.g., advertisements, agendas, minutes of meetings, reports, notes, journals, letters, posters and press releases, pamphlets and social media posts). These revealed the process and approach adopted by each institution and are listed in AppendixVI. Documentary evidence, combined with interview data and observation, minimise bias and establishes credibility (Wood et al.,2020).

## 4.13    Overall Data Analysis

"Data analysis is central to qualitative research" (Maguire & Delahunt, 2017, p. 3351). There are various techniques for analysing mixed method data, but the choice should be driven by the research objectives, purpose, questions and data collection type (Johnson & Christensen, 2011) as there is no one approach (Braun et al., 2016).

As data is collected over time, Miles and Huberman (1994) recommend an interim analysis to develop a deeper understanding of the research topic and inform the next steps in the research. This also helps to refine and test theories.

Theoretical saturation is commonly used in qualitative research, particularly within grounded theory methodology. (Charmaz, 2006), refers to the point at which no new information or insights are being discovered in the data. At this stage, additional data collection and analysis no longer contribute to developing new properties of the studied categories. Examples of theoretical saturation include:

**Data Redundancy** occurs when researchers repeatedly encounter the same themes or patterns in the data, indicating that no new information is emerging and suggesting that the categories being studied are well-developed and understood.

**Category Development**:  The research is rich and detailed, fully exploring each category's properties and dimensions. The relationships between categories are also well-defined.

**Conceptual Density**:  The data has sufficient depth and complexity to support the theory being developed. This involves having detailed and varied data to explain the phenomena under study thoroughly.

**Guided by Purpose** - Saturation is not just about reaching a numerical target of data points but is guided by the research purpose. The goal is to ensure that the theoretical constructs.
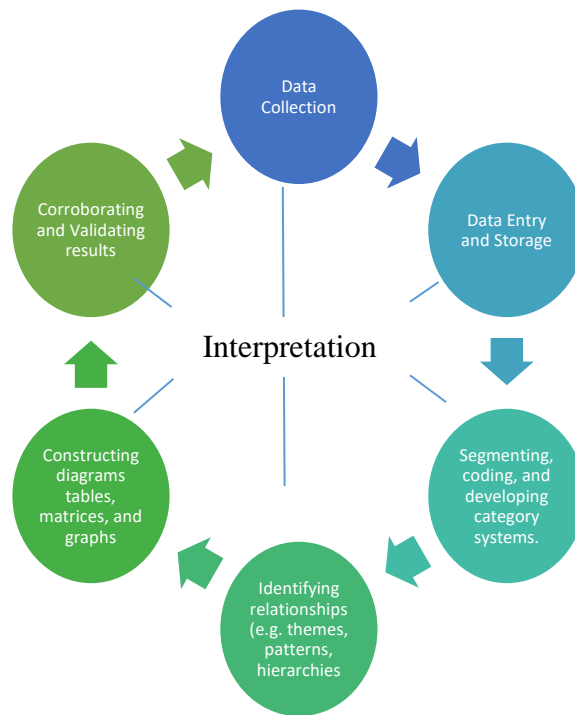
**Figure 4.7. Data analysis in qualitative research (Johnson & Christensen, 2011, p. 501)**

### 4.13.1 *Segmenting Data and Coding Data*

Segmenting data involves dividing data into significant units for a researcher to question and review text in the context of what has gone before and what follows (Johnson & Christensen, 2011).

Coding is a process for marking segments of data. Codes are pieces of information – words, categories, phrases, and paragraphs; Johnson & Christensen, 2011). It turns the data analysis into a systematic process. As the research included a survey, case studies and documentary analysis, Taguette was chosen as an analysis tool to identify codes from the qualitative responses relevant to the research questions that captured the analytically pertinent aspects of the data set (Braun et al., 2016). It is essential to check that the analysis fits with the data and tells a coherent story of how it addresses the research question.

### 4.13.2 *Thematic Analysis*

Thematic analysis is the process of identifying patterns of themes within qualitative data and interpreting them. It is an active process, a method to analyse data rather than a whole

framework (Braun et al., 2016). Braun and Clarke (2019, p. 78) suggest it is a primary qualitative method as it "provides core skills that will be useful for conducting many other kinds of analysis." They distinguished between two levels of themes – semantic and latent. A semantic focus is coding and reporting on explicitly stated ideas, concepts, meanings, and experiences. In contrast to a latent focus, one codes and develops analysis around more implicit ideas or concepts that underpin what is explicitly expressed. It shapes and forms the semantic content of the data (Braun et al., 2016).

Braun and Clarke (2016) developed a six-step framework to approach a thematic analysis:

**Table 4.5. Braun and Clarke's Six-phase framework for doing thematic analysis**

| Step 1: Become familiar with the data | Step 4: Review Themes |
| Step 2: Generate initial codes | Step 5: Define themes |
| Step 3: Search for themes | Step 6: Write up |

This approach was used to analyse the data for the research study. It began by reviewing the qualitative data from the survey and case study and moving between the data sets to familiarise, code, revise and name the themes. This process draws on theoretical assumptions, knowledge, research, and experience as an active process that involves movement back and through the data.

Reviewing and defining the themes that capture and reflect the data contributes to an analytical narrative, including the data's descriptive and interpretative reflection and how the research question is addressed. It brings depth and detail to the analysis.

Finally, writing up the data is integral to balancing data extracts and analytic commentary and is suited to descriptive analyses. It provides opportunities that reflect the breadth of themes or feature an analytic research point. Data extracted from the data set can be illustrative or analytical. Illustrative narrative data is summarised in contrast to analytic data, which is discussed (Braun et al., 2016), and thematic analysis reflects a combination of both approaches.

Similar to Ahern (1999), Braun and Clark (2013) also concur that keeping a research journal to record and reflect the process and practice helps ensure robust qualitative practice and maintain quality concerning the research. The Braun and Clark (2016, p. 37)

checklist below illustrates the process for good thematic analysis, which I followed as part of the research analyses.

**Table 4.6. 15-point "Checklist for good thematic analysis (Braun & Clarke, 2006, p. 96)**

| Process | No. | Criteria |
|---|---|---|
| Transcription | 1 | The data has been transcribed to an appropriate level of detail, and the transcripts have been checked against the tapes for 'accuracy.' |
| Coding | 2 | Each data item has been given equal attention in the coding process. |
| | 3 | Themes have not been generated from a few vivid examples (an anecdotal approach), but instead, the coding process has been thorough, inclusive and comprehensive. |
| | 4 | All relevant extracts for each theme have been collated. |
| | 5 | Themes have been checked against each other and back to the original data set. |
| | 6 | Themes are internally coherent, consistent, and distinctive. |
| Analysis | 7 | Data have been analysed – interpreted, made sense of – rather than just paraphrased or described. |

| Process | No. | Criteria |
|---------|-----|----------|
| | 8 | Analysis and data match each other – the extracts illustrate the analytic claims. |
| | 9 | Analysis tells a convincing and well-organised story about the data and topic. |
| | 10 | A good balance between analytic narrative and illustrative extracts is provided. |
| **Overall** | 11 | Enough time has been allocated to complete all phases of the analysis adequately without rushing a stage or giving it a once-over-lightly. |
| **Written report** | 12 | The assumptions about, and specific approach to, thematic analysis are clearly explicated. |
| | 13 | There is a good fit between what you claim you do and what you show you have done – i.e., the described method and reported analysis are consistent. |
| | 14 | The language and concepts used in the report are consistent with the epistemological position of the analysis. |
| | 15 | The researcher is positioned as active in the research process; themes do not just 'emerge.' |

### 4.13.3 Data Analysis

I adhered to Braun and Clarke's thematic analysis approach, which involves coding qualitative data to discern recurrent patterns or themes, assisting researchers in revealing deeper insights. While various coding methods exist, I opted for grounded theory, also known as emergent coding, which allows codes and themes to emerge organically from the data in response to the research question. This contrasts with structured coding, which relies on preidentified codes and themes, a method I found overly rigid and pre-emptive. Employing a descriptive coding approach, I matched the literal interpretation of words in the text (Saldana, 2015). Subsequently, I thematically recoded the initial codebook into three categories: factors, processes, and implementation (Appendix VIII).

I read the transcripts multiple times and then recoded them in Excel to identify initial themes. While software programs can aid in data analysis, it is essential to note that they cannot interpret data for researchers. Thus, researchers remain the primary tool for analysis, bringing flexibility, insight, intuition, and understanding to the research process (Denzin & Lincoln, 2005).

I applied Braun and Clarke's thematic analysis approach to Taguette, a computer-assisted qualitative data analysis software. Taguette was chosen for its ability to manage large data volumes and efficiently facilitate analysis. Adding nodes and keywords to the data, I recorded, stored, indexed, and sorted information (Leech & Onwuegbuzie, 2011). Once familiar with the data, I imported it into Taguette, which provided a platform to manage qualitative data challenges, develop code schemes, apply codes to interview transcripts, and organise themes (Garcia-Horta & Guerra-Ramos, 2009).

I also used documentary analysis to complement the case study approach and review the approach taken by each university. Morgan's (2022) paper on qualitative documentary analysis states that this approach is equally vital to information collected during interviews and useful to triangulate data when used with other research methods. It increases the trustworthiness of a study as it is objective, stable data, unlike interviews, which can be subjective. It is not, however, a recommended method on its own, as it contributes to biased selectivity. As documents are not produced for research purposes, they may not provide a continuous record of an activity or event or may not exist, utilising pre-existing texts as data raises fewer ethical concerns (Merriam, 1991). However, researchers should

be aware of limitations such as reporting bias. One must ascertain if the author was writing it for public or private consumption—the more public the content, the less cause for concern (Hookway, 2008).

Flick (2019) recommended four factors when deciding what documents to use for the documentary analysis: authenticity, credibility, representativeness, and meaning.
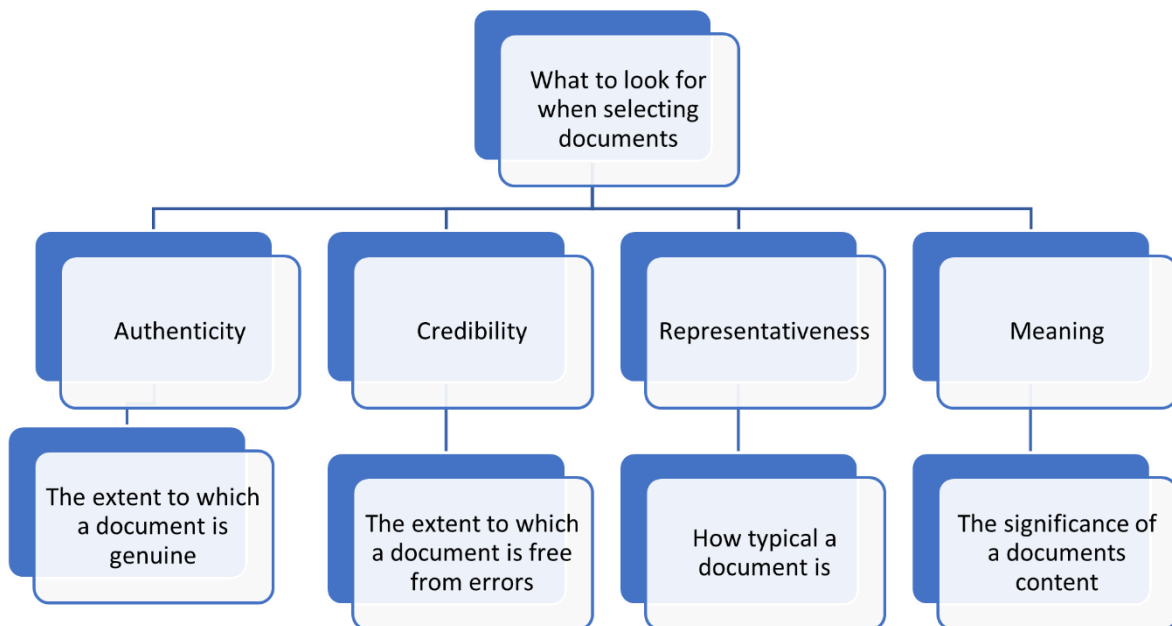


**Figure 4.8. Factors to Use When Selecting a Document (Flick 2019) adapted from Kriedel (2015)**

As the research question and other process aspects unfold, the number of documents required cannot be determined in advance (Morgan, 2022). This study has examined all documents related to the Ten Principles of an AFU, including the strategic plan of each institution, relevant minutes of meetings, internal PowerPoint presentations, the original application document to become an AFU member, digital and print advertising, promotional material, press releases and social media. Documents identified for analysis were publicly available online from the university or submitted as part of an application to DCU to join the AFUGN (Appendix V).

Braun et al. (2019) recommend thematic analysis as an ideal document analysis method, and I adhered to this approach. It is not theoretically driven, does not prescribe epistemological or ontological frameworks, and offers a versatile approach. There are three

approaches: reflexive, coding reliability, and codebook. Reflexivity relates to how the researcher's values, history, and decisions affect the results. It is an approach based on a qualitative paradigm "because it emphasises the researcher's subjectivity as a resource rather than a problem" (Morgan, 2022, p. 73). Awareness of the social, political, cultural and economic factors influencing a researcher's perspective is essential to a reflexive approach (Guba & Lincoln, 1994). As a researcher interprets data, a coding process becomes more evident and leads to themes reflecting patterns of shared meaning (Braun et al., 2019). A reflexive thematic analysis has been used for this study in combination with a positivistic approach as it examines factual evidence or corroboration to confirm facts, content analysis, qualitative document analysis and historicism, as Denzin (2017) noted.

### 4.13.4 Transcription

Nikander (2008, p. 226) states, "analysis of transcripts, particularly conversation analysis, is rigorous in its requirement of empirical grounds for any description to be accepted as valid." Transcribing data extracts requires attention to detail, noting overlaps, pauses, hesitations, laughter, etc. Using recorded interviews provides qualitative researchers with repeatable resources that allow multiple hearings and viewings. Transcription does not need to claim perfection, but it does need to reflect transparency and make the author directly accountable for the transcription (Nikander, 2008). Transcripts were returned to respondents for review to ensure transparency and acceptability of the transcription.

### 4.13.5 Ethical Considerations and Data Protection Procedures

"*If academics are to research with integrity, then that integrity must be a feature of the whole research process. Indeed, the researcher needs to be ethical*" (Macfarlane, 2009).

Research ethics are crucial to scientific integrity, human rights and dignity, and collaboration between science and society. Ethical considerations are the principles that inform research design and practice and include voluntary participation, informed consent, anonymity, confidentiality, the potential for harm, and results communication (DCU Research Office, 2023). One must balance research objectives with ethical research methods to prevent participant harm and ensure credibility and integrity. Ethics should be regarded as empowering rather than restricting discussions (Macfarlane, 2009).

Diener and Crandall (1978) suggest ethical principles can be broken down into four main areas: whether there is harm to participants, whether there is a lack of informed consent, whether there is an invasion of privacy, and whether deception is involved. Researchers need to consider ethical issues that may arise during a study, as research involves collecting information from people about people. Researchers also need to protect their subjects and promote the integrity of the study (Creswell, 2014). Seeking informed consent ensures that the subjects know the information being sought, why and how it is being used, how they will participate in the study and if it will directly or indirectly affect them. The consent must be voluntary, without pressure of any kind, and there must be an understanding that they may withdraw at any time without explanation (Kumar, 2011).

Before starting this research study, a proposal was submitted to DCU's internal ethical review process. This process is built on a firm foundation that research integrity is about knowing and meeting responsibilities as a researcher performing research to the highest standards of professionalism at all points of the research process – from design to dissemination. Ensuring ethical standards is an essential aspect of the research process. A Research Ethics Committee (REC) was established to promote the highest ethical standards in all research at DCU involving human participants or animal subjects. The approach detailed guidelines for the submission process, incorporating ethical review procedures and topic-specific resources to guide the development of the proposal. The REC provides advice and reports annually on research activity at DCU.

Kant's (1964) categorical imperative, particularly the formulation of "respect for persons," states that human beings should act only according to maxims that they would will to become universal laws. It means individuals should act in a way that they would want everyone else to act and treat others as ends in themselves, not merely as a means to an end. This reasoning is compelling, as it emphasises treating research subjects as independent, autonomous agents, prioritising their participation over potential harm. This importance is underscored, mainly when researchers personally engage with the research subject matter. Kant (ibid) found that researchers were more emotionally equipped to empathise with the position of those they were researching when they had prior experience with the subject. A commitment to universally respected ethical standards reflects the researcher's role in this study. It includes obtaining informed consent by ensuring that all participants are fully aware of the nature of the study and voluntarily agree to participate. Maintaining transparency involves being honest and transparent about the research

purpose, methodology, and potential impacts. Confidentiality is upheld by protecting participants' privacy and handling data with care.

Ensuring dignity and autonomy means that the voices of all participants are heard and respected, integrating their experiences and perspectives into the research. Avoiding exploitation ensures that participants are not manipulated for research purposes and that the research benefits ideally extend to them.

Applying the universalisability test to research practices also means considering the broader implications of the study's conduct and outcomes. It involves designing the research so that its methods and findings can be applied or tested in other contexts, thereby creating robust and reliable knowledge. Evaluating whether the research processes and outcomes contribute positively to the broader goal of creating age-friendly universities includes considering sustainability and the potential for widespread adoption of successful practices.

## 4.14    Reflexivity

Ahern (1999, p. 307) defines reflexivity as the "capacity of any system of signification to turn back upon itself, to make its own object by referring to itself." As the AFUGN Coordinator, maintaining neutrality can be challenging. The reflexive research approach requires acknowledging and understanding the power dynamics within the research relationship (Malterud et al., 2016).  Ahern refers to reflexive bracketing as a means of demonstrating the validity of the data collection and analysis and proposes guidelines to facilitate the reflective process.

**Table 4.7. Guidelines to facilitate the reflective process (Ahern, 1999)**

| | |
|---|---|
| 1. Identify some of the interests that, as a researcher, one might take for granted when undertaking the research. | 5. Recognise feelings which may indicate a lack of neutrality. |
| 2. Clarify personal value systems and acknowledge areas of subjectivity. | 6. Identify new or surprising findings in the data collection and analysis – is it a cause of concern or saturation? |
| 3. Describe any areas of potential role conflict. | 7. Reframe the process if blocks occur. |
| 4. Once fieldwork has started, try to become attuned to feelings signalling reflexive thought. | **Post analysis.**<br><br>8. Does the literature support the analysis or express a similar cultural approach? |

### 4.14.1 Reflective Journal

Ahern also advises keeping a journal of the process as it can illuminate opinions, thoughts, and feelings, contributing to the research design and interpretation process. As the research process evolved, I kept a visual journal of experiences, observations, and notes, facilitating critical reflection and minimising researcher bias (Appendix IX)). Visual methodologies can express ideas in a non-verbal way and contribute to the richness of the data by illustrating layers of meaning which add validity and depth (Glaw et al., 2017). In this research context, using a visual journal proved invaluable, serving multiple essential functions as the process unfolded.

The visual journal primarily facilitated critical reflection. By visually documenting experiences, observations, and notes, the researcher could capture and revisit the emotional and contextual subtleties of the fieldwork. This method enabled deeper insights and more reflective practice, enhancing the overall understanding of the research. Minimising researcher bias was another significant benefit. Recording thoughts and observations visually helped externalise my internal processes. This approach made it easier to identify and address personal biases. By having a tangible record to refer to, I could cross-check

initial impressions with later reflections, promoting a more objective and balanced analysis.

The visual journal also played a crucial role in enhancing data triangulation. Complementing other data sources, such as interviews and document analysis, provided an additional layer of triangulation. This enrichment of the overall dataset contributed to a more robust and credible research outcome. Visual records of observations and experiences could be compared and contrasted with written documents and interview transcripts, ensuring a holistic view of the research context.

Another advantage of the visual journal was its ability to support memory and recall. The visual elements aided memory, helping to recall specific details and contexts that might otherwise be forgotten. Sketches, diagrams, and visual notes captured at the moment preserved the richness of the original experiences more effectively than text alone.  The visual journal also encouraged creativity and engagement. This method of documentation was more engaging and enjoyable than traditional note-taking. Such creative engagement led to more thorough and enthusiastic documentation, capturing details and insights that might be overlooked in a more rigid, text-only approach.

Communicating findings was a potential area where the visual journal could be used to communicate research findings to others. By providing vivid, illustrative examples of the research process and outcomes, the visual journal would make it easier for audiences to grasp complex concepts and appreciate the research context.

Finally, the visual journal was instrumental in tracking the evolution of the research. It documented the development of the research process, capturing changes in thinking, emerging themes, and shifts in focus over time. This meta-level documentation provided a valuable record of the research journey, offering insights into the study's development and the iterative nature of the research process, adding depth and richness to the research and ensuring a more comprehensive and credible study.

### 4.14.2  Research Integrity in DCU

Research integrity relates to the performance of research to the highest standards of professionalism and rigour at all points of the research process and to the accuracy and

integrity of the research record in publications and elsewhere. Maintaining well-established ethical standards is essential to upholding the research process's integrity. In DCU, the Research Ethics Committee (REC) promotes ethical standards in all research. In addition to providing guidelines on the submission process for ethical review, it also offers topic-specific resources and guideline documents to inform the proposal development process. There are several codes of practice at DCU that ensure academic integrity. The primary "Code of Good Research Practice" provides guidelines and advice on the proper conduct of research, standards of work performance and the ethical conduct required of all DCU staff and students and persons engaged in research at DCU and are underpinned by four factors:

- Reliability ensures the quality of research, reflected in the design, methodology, analysis, and use of resources.
- Honesty in developing, undertaking, reviewing, reporting and communicating research in a transparent, fair, full and unbiased way.
- Respect for colleagues, research participants, society, ecosystems, cultural heritage and the environment.
- Accountability for the research from idea to publication, its management and organisation, training, supervision and mentoring, and its wider impacts.

This study respected the regulations and charter outlined by DCU. Ethics approval was formally granted prior to commencing the research study (see Appendix VII).

## 4.15  The Ethics Application Process

Before commencing the research study, an ethics proposal was submitted electronically to the REC for consideration. The application had several sections.

- **Administrative**: This includes information such as the project title, timeframe, level of risk, principal investigators, and location of investigation.
- **Project Outline**: This section outlined the lay description, aims and justification, and project methodology. It also sought information on the investigator's qualifications, experience and skills, participant profiles, how the participants were recruited, their identities protected and where the data were stored.

- **Risk and Risk Management**: Explored the procedures and potential psychological threat to the participants, how it would be handled, and the time frame involved.
- **Data/Sample Storage, Security and Disposal**: This section refers to audio-recorded interviews, transcripts, surveys, and analysis.
- **Funding the Research**: This section explores how research is being funded, by whom, and whether there was a potential conflict of interest or incentive to participate.
- **A Plain-Language Statement, Consent Form,** and the use of technology (Zoom, etc.) in the research.

The initial response to the research commenced with an ethics application to the DCU REC, approved by my supervisor. It was approved following a meeting of the REC. Empirical data will be stored on the DCU researcher's secure Google Drive encrypted computer for three years. It will only be used for research outputs related to this research project, primarily the Ed.Doc thesis, academic presentations and seminars, conferences and publications in scholarly journals. Confidentiality cannot be guaranteed as the participants are critical actors within a small community*;* however, results will be anonymised and only analysed by the principal researcher. The principal researcher will hold interview notes and transcripts and store them securely.


## 4.16    Research Bias and Positionality

Research bias is a factor to consider in a research study (Davies, 2007). Norris (1997, p. 173) cautions that "research is a human activity subject to the same failings as other human activities." As the AFU Coordinator, I have in-depth knowledge and experience of each AFU member and was instrumental in assisting them with their application to become members of the AFUGN. This close involvement could influence the research, introducing biases affecting the study's validity.

To ensure objectivity and uphold the integrity of the research, I have implemented systematic procedures and committed to presenting all evidence honestly. Aware of potential sources of bias, such as respondents possibly providing demagogic information due to their familiarity with me and my leadership role in the AFUGN, I have taken several measures to mitigate these risks. For example, the questions posed to respondents were

carefully crafted to focus specifically on their personal experiences and their respective universities rather than on broader AFUGN-related matters or my role within the organisation. This approach aims to reduce the likelihood of responses being influenced by their relationship with me or their perceptions of the AFUGN.

Additionally, I have taken a transparent approach to acknowledge and manage any remaining biases. By rigorously documenting the research process and the measures taken to minimise bias, I strive to provide a clear account of the study's methodology. Despite these efforts, I recognise that some deviation from the absolute truth may still exist. In such cases, I am committed to declaring these deviations as known limitations of the work, ensuring they are communicated to readers and stakeholders. This transparency allows for a more nuanced understanding of the findings and the context in which they were obtained, ultimately contributing to the robustness and credibility of the research.

## 4.17    Research Credibility

Guba and Lincoln (1994) advocated the importance of defining terms to establish and evaluate qualitative research, emphasising the need for trustworthiness and authenticity as alternative criteria to traditional quantitative standards.

**Table 4.8. Description of Lincoln and Guba's Quality Criteria (Guba & Lincoln, 1994) in Earnest, 2020**

| Lincoln and Guba's Quality Criteria | Meaning | Analog in Quantitative Research |
|---|---|---|
| Credibility | Confidence in the truth of data and interpretations of them. | Internal Validity |
| Dependability | Stability of data over time and conditions. | Reliability |
| Confirmability | Potential for congruence between two or more independent people about the data accuracy or meaning. | Objectivity |
| Transferability | Extent to which findings can be transferred or to have applicability in other settings or groups. | External validity |
| Authenticity | Extent to which researchers fairly and faithfully show a range of realities. | Content Validity |

Guba and Lincoln (1994) argue that there can be more than one truth about the social world. The significance of this argument is evident in the trustworthiness criterion of credibility. The credibility criteria establish that qualitative research results are credible from the participant's perspective. As the purpose of qualitative research is to understand the phenomena of research from the participant's viewpoint, the participants are the only ones who can legitimately judge the study's credibility. Establishing the credibility of the findings ensures that the research is robust and has adhered to best practices.

The research study participants are all members of the AFUGN with expertise and involvement in ageing who understand the network's fundamental rationale. This is a valid means of strengthening the research's trustworthiness.

As the first stage of the research involved Survey Monkey, the software automatically generated an extended numerical chain participant code that anonymised the responses. It

was subsequently edited to a simplified numerical identifier. Similarly to the case studies, participants were assigned an alpha code included in the document analysis. These are outlined in Chapter 5, Findings. The ID codes will be used when analysing data and then referenced when quotes are used to present findings (Appendix VIII).

## 4.18    Triangulation

Bryman (2011) emphasises the need for consistent results to ensure data reliability and outlines four threats that can affect the reliability of the research: participant error and bias and observer error and bias — triangulating the data addresses these threats. Triangulation is a method of analysing the data from multiple perspectives so that findings can be cross-checked and mutually corroborated (ibid, 2011). As this is a mixed methods research study, a quantitative survey, qualitative case study and documentary analysis used a triangulation approach by obtaining information from multiple sources (Cresswell, 2009). The mixed-methods process sought to ensure a comprehensive response from the AFUGN members. This approach helped ensure that the researcher or participant's partiality was limited, and the approach corroborated the study results from different methods on the same phenomenon.

## 4.19  The Application of Saunder's Research Onion to the Research Approach

The research onion model succinctly outlines the systematic approach to this study, starting with broad philosophical foundations and narrowing down to specific data collection and analysis methods. The research philosophy combines positivist and interpretivist paradigms at the outermost layer, reflecting a pragmatic approach. The next layer details the research approach, which incorporates inductive and deductive methods. Following this, the methodological choice includes mixed methods and purposive sampling to ensure comprehensive data collection. The research strategy layer encompasses diverse strategies such as a survey, case studies, document analysis and grounded theory, providing a robust framework for investigation. The time horizon distinguishes between cross-sectional and longitudinal studies, allowing for flexibility in study duration. Finally, the data collection and analysis stage is at the core, utilising methods such as document analysis and reflexive thematic analysis. Other research methods were considered, such as Delphi, Ethnography, and Participatory Action research. However, his structured progression from philosophical considerations to specific research

techniques offered a coherent and comprehensive approach, chosen for its effectiveness in exploring the research question: "The Influencing Factors and Process of Becoming and Remaining an Age-Friendly University."
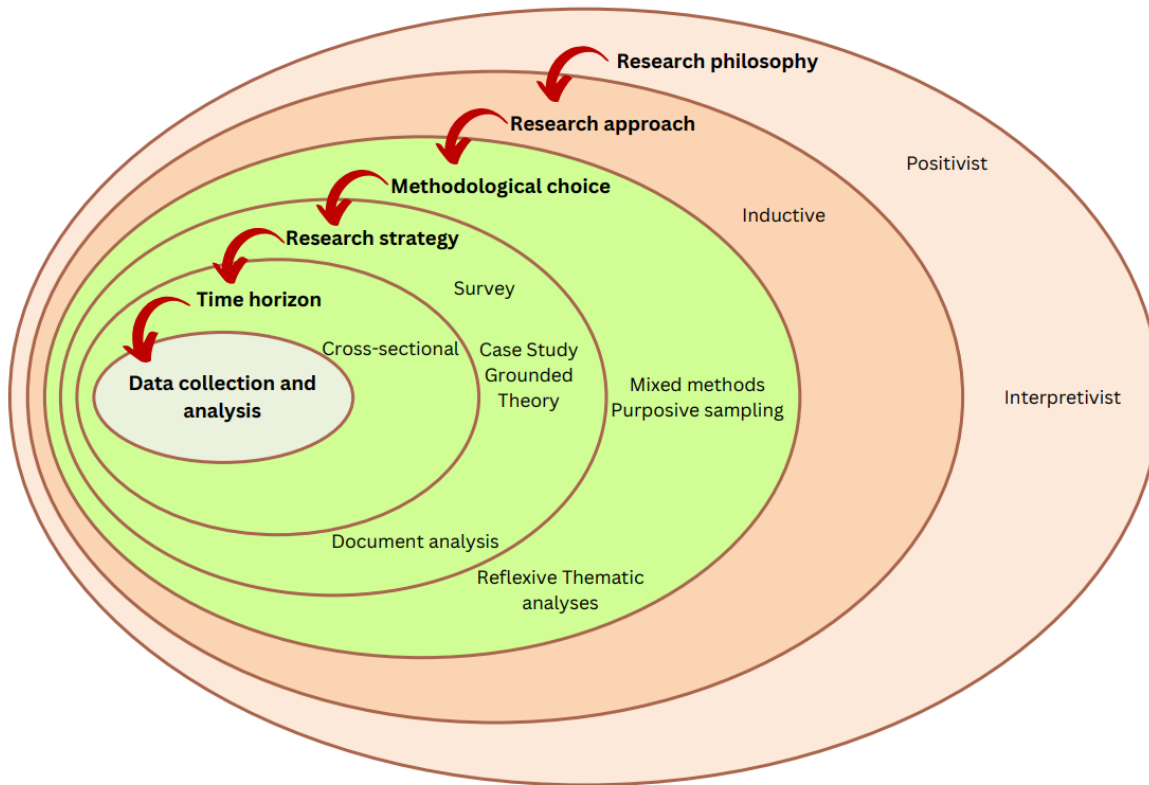


**Figure 4.9. Summary of proposed research methodology "The Factors and Processes of Becoming and Remaining an Age-Friendly University**

## 4.20    Conclusions

This chapter began by briefly reviewing the previous chapter, outlining the research problem, approach, design, and methods used in this study, and explaining why these methods were used to analyse the data. It discussed how the concept of Saunder's (Thesismind, 2019) research onion was applied to the study and progressed, as well as an outline of the epistemological and ontological outlook guiding the research. It contains a detailed account of the research process from the design to data collection to the data analysis stage, including the ethical considerations. Chapter Five follows with a presentation of the research findings.

# Chapter 5: Findings

"*It is a capital mistake to theorise before one has data.*"- Arthur Conan Doyle (writing as Sherlock Holmes; 1859-1930)

## 5.1    Introduction

This research explores the influencing factors and process of becoming and remaining an AFU. There are recommendations on how to join the AFUGN; however, no defined or prescribed way outlines the process and factors of consideration for becoming an AFU before joining the AFUGN. There is scant literature and little documentation on how AFU members have approached joining the AFUGN or the factors influencing their decision to join. Also, the AFU concept is open to interpretation on how it is implemented. This research is especially needed because the AFUGN is rapidly growing. This study aims to address this research gap.

This chapter presents a narrative of the study's findings on influencing factors and process of becoming and remaining an AFU, starting with a quantitative online survey of the 83 AFUGN members. It also explores how the AFUGN members interpreted and implemented the Ten Principles of an AFU. While other age-friendly studies focus on age-friendly environments (Ball et al., 2015) or age-friendly ecosystems (Fulmer et al., 2020), this study uniquely examines age-friendly practices in the context of the Ten Principles of an AFU within a higher education framework. The mixed methods study comprised three research stages.

## 5.2    Research Stages

### 5.2.1   Stage 1 Quantitative Survey

Survey data can be informative about the factors and processes related to becoming an AFU. The survey findings can be safely generalised, given that the sample is selected using the following principles.  The survey results were compared against two case studies and document analyses to avoid potential sample selection bias. The survey was sent to the 83 designated AFU Champions in each institution who are members of the AFUGN. There were 45 responses representing a 54.21% response rate, rounded down to a 54.2% response rate. The survey focused on the *factors* of importance to the institution (for example, the

strategic plan, mission, vision, and Sustainable Development Goals) and the *process* they engaged in to *identify*, *interpret,* and *implement* the Ten Principles (for example, resources, staffing, communication, responsibility). This survey method was chosen because it allows for drafting, editing, and trialling questionnaire response types (Waclawski, 2012).

### 5.2.2   Stage 2 Case Study

The second stage of the research focused on a case study of two universities. These universities were chosen because of their location, length of time in the AFUGN and differing cultural approaches to ageing based on national policy. The interviews were conducted via Zoom. Each university was invited to participate in a semi-structured interview with some open-ended questions and probes. Each interview was one hour long and was recorded, transcribed, and returned to the respondents for corrections. The study presents the narratives under two headings – factors and processes of becoming an AFU and a subheading on how the Ten Principles were interpreted and implemented in each institution. These narratives are interpreted in the context of the Ten Principles and the broader definition of age-friendly (International Federation on Ageing, 2019). Four interviews were conducted: three with staff members from McMaster University in Hamilton, Canada, and one with a staff member from Myserak University in the Czech Republic. Since McMaster University has been a member of the Age-Friendly University Global Network (AFUGN) since 2017, it has more staff involved in the AFU initiative. In contrast, Myserak University joined the network in 2021 and currently has only one designated AFU Champion.  Thomas (2011, p. 7) stresses the importance of being able to "hear the sound of voices"; therefore, quotations from the participants are used throughout the chapter.

### 5.2.3   Stage 3 Document Analysis

Triangulation, a quality assurance tactic, cross-validates and examines converging evidence to ensure robust and rigorous findings (Bardach & Patashnick, 2016). Stake (1995) emphasises triangulation to maintain a disciplined approach in case study research, ensuring it is not merely based on intuition, good intention, and common sense (p. 107).

To enhance the data's trustworthiness, document analysis was conducted alongside interviews (Merriam, 2015; Morgan, 2022). This includes both printed and electronic

documents such as advertisements, agendas, meeting minutes, reports, notes, journals, letters, posters, press releases, pamphlets, and social media posts (Appendix VI). These documents reveal each institution's processes and approaches.

This chapter seeks to uncover the underlying factors and processes facilitating institutions' transition to age-friendliness, along with the interpretation and implementation of the Ten Principles. It also offers insights into the factors shaping the approach of AFUGN members, where applicable. The following sections detail the findings from the study.

## 5.3    Survey Findings

### 5.3.1    Determinants of Becoming an AFU

Understanding the determinants of becoming AFU is crucial for increasing the prevalence of adopting and implementing the Ten Principles. Finding the relevant determinants can be very informative in understanding the process and factors of becoming and remaining an AFU. It can also help further understand how the Ten Principles were interpreted and which are of more interest to the AFUGN members. Therefore, using the survey data, this section aims to provide insights into the potential factors and processes that influenced the decision to become an AFU and how the Ten Principles were interpreted.

The survey comprised twenty-five questions, including radio buttons for use with categorical data and Likert Scale buttons. It also offered multiple-choice, open-ended, and closed-ended questions and limited qualitative responses where respondents could elaborate in free text. Questions were primarily quantitative, containing nominal and ordinal questions relating to each university's cultural, societal, and institutional approach to the factors and implementing and interpreting the Ten Principles of an AFU. They also examined the process of engagement.

**Question 1 – On what continent is your institution located?**

The results below show that North America (USA and Canada; 75.6%) have the highest representation of members, followed by Europe (15.6%), Asia (4.4%), South America (2.2%) and Australia (2.2%). Even though the AFU concept originated in Europe (Dublin City University), North American institutions have adopted the Ten Principles in greater

numbers than the rest of the world. It may be related to the larger number of institutions in North America, with larger populations and, therefore, more demand for ageing-related policies and a broader knowledge exchange about the AFU through networks engaged in ageing research, education, and policy. Also, the cultural approach and values towards ageing (Dimmock & Walker, 2000) are a factor of consideration for higher education institutions on different continents.

**Table 5.1. Location of Institutions that participated in the survey**

|  | N | Percent |
|---|---|---|
| Europe | 7 | 15.6% |
| Asia | 2 | 4.4% |
| North America | 34 | 75.6% |
| South America | 1 | 2.2% |
| Australia | 1 | 2.2% |
| Observations | 45 | 100% |
|  |  |  |

**Question 2 – In what year was your Institute founded?**

This question related to the length of time a university was established. The oldest university was established in 1809 and the youngest in 1984. The institutional age range of AFUs is quite broad, with several universities established over 100 years. These findings indicate that of the AFUGN members who participated in the survey, older institutions have embraced the AFU concept more readily. However, this does not necessarily mean older institutions are more age-friendly. The next question investigates this further by highlighting the relationship between size, resourcing AFU and becoming AFU

**Table 5.2. Age of Institutions**

| Mean | 101.67 |
|---|---|
| Median | 107 |
| Std. Deviation | 62 |
| Range | 236 |
| Minimum | 2 |
| Maximum | 238 |
| Observations | 43 |

**Question 3 – How many students attend your institution?**

Institutional population size is considered small when it has under 5,000 students and larger when it has over 15,000 students (Ross, 2016). The number of students attending ranged from a small private institution of less than 800 to a large institution of over 55,000 students.

Table **3** shows that the minimum number of students is 750, indicating that this AFU is a small institution, for example, a community college. However, the mean and median values above 15,000 signal that the larger institutions may be more open to becoming AFUs as they may have more age-related teaching, learning, and research and may be better positioned to support and deploy resources to the AFU initiative. Overall, even though some small universities are also becoming AFUs, the majority of the AFUs are significant with respect to the number of students. This finding may signal a different approach towards small and large institutions when promoting the transition to becoming age-friendly.

**Table 5.3. The number of students that attend your AFU**

| Mean Number of Students | 19,425 |
|---|---|
| Median Number of Students | 16,756 |
| Std. Deviation of Number of Students | 13,547 |
| Range of Number of Students | 54,250 |
| Minimum Number of Students | 750 |
| Maximum Number of Students | 55,000 |
| Observations | 43 |

**Question 4 – How long has it been an AFU?**

Most respondents (71.11%) have been an AFU for between 1 and 3 years. Fewer (22.22%) have been members for 3-5 years, and 6.67% have been members between 5 – 11 years. It indicates that becoming age-friendly is gaining more attention and importance, and more institutions are becoming aware of the AFU. The increased life expectancy underscores the necessity for more education, training, and research related to ageing. Moreover, expanding knowledge and improving the effectiveness of age-friendly practices should motivate other institutions to adopt the Ten Principles of Age-Friendly Universities.

**Table 5.4. How long has it been an AFU?**

|  | N | Per cent |
|---|---|---|
| 1- 3 years | 32 | 71.1% |
| 3 - 5 years | 10 | 22.2% |
| 5 - 11 years | 3 | 6.7% |
| Observations | 45 | 100% |

**Question 5: - Where is the AFU positioned in your university?**

The chart below indicates that 46.67% of the AFU initiatives are positioned outside a specific school or faculty. In the narrative response, several respondents were explicitly engaged in nursing, care and psychology; in other institutions, AFU initiatives are located in positions ranging from the Office of the VP to an Interdisciplinary Steering Council and specific research centres. Only one response indicated AFU lay with the Department of Access and Lifelong Learning. Fewer respondents, 26.6%, reported the AFU as located in a School or Faculty, 13.3% in a standalone department, 8.89% in the Equality and Diversity Unit, and 4.4% in the President's office.
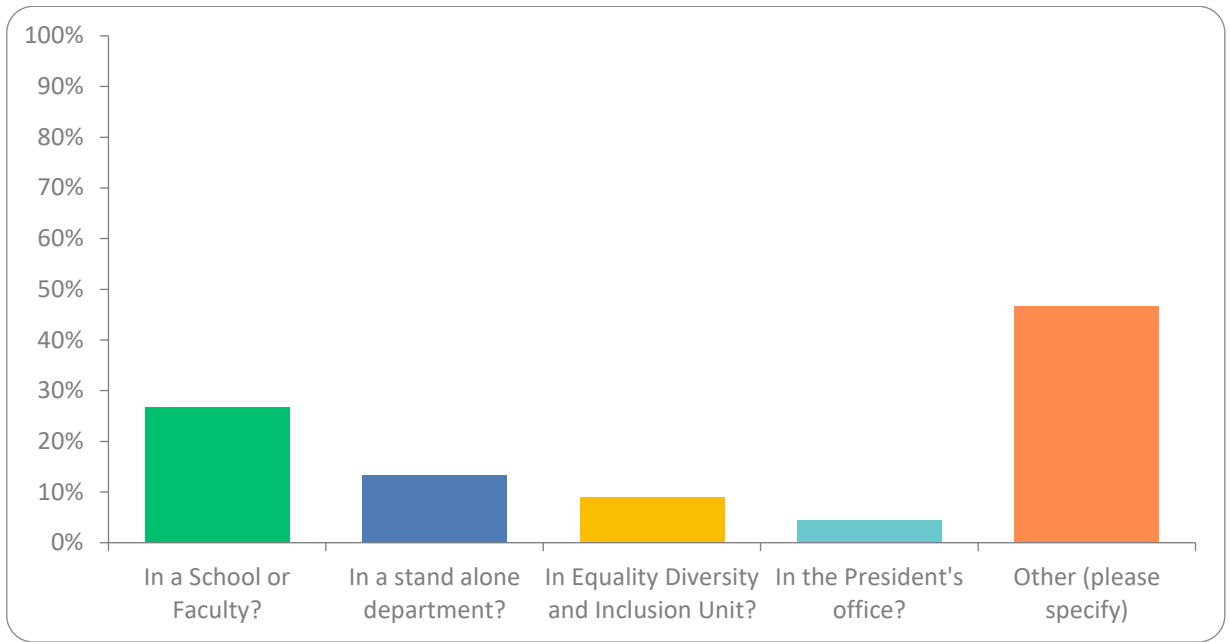
**Figure 5.1. The position of the AFU in the institution**

The duration of AFU adoption may also be relevant for the position of AFU in the institution. To understand if a relationship exists, one can cross-tabulate the information in Table 4 above with the information on where AFU is positioned in the institution. Table 5.2.5 below presents the results of this cross-tabulation. The findings in Table 5.2.5 imply that regardless of the duration of AFU membership, in most institutions, the AFU is positioned in places other than School/Faculty, Stand Alone Department, Equality Diversity Unit or President's Office. Schools/Faculty follow other locations, and a small group of institutions position the AFU as a Stand Alone Department or within the Equality Diversity Unit.

**Table 5.5. How long has it been an AFU vs. the position of AFU in the institution**

| Duration of AFU Membershi p | | Position of AFU in the Institution | | | | |
|---|---|---|---|---|---|---|
| | | Other | School or Faculty | Stand Alone Departme nt | Equality Diversion Unit | President' s Office |
| 1- 3 years | Count | 14 | 9 | 4 | 4 | 1 |
| | Expected Count | 14.9 | 8.5 | 4.3 | 2.8 | 1.4 |
| 3 - 5 years | Count | 5 | 3 | 1 | 0 | 1 |
| | Expected Count | 4.7 | 2.7 | 1.3 | .9 | .4 |
| 5 - 11 years | Count | 2 | 0 | 1 | 0 | 0 |
| | Expected Count | 1.4 | .8 | .4 | .3 | .1 |

**Question 6 – Is there a dedicated staff member assigned to the AFU?**

Most AFUs (66.7%) do not have a dedicated staff member assigned to the AFU (as shown in Table 5.2.6). This finding is in line with the findings presented in Table 13 (How AFU is resourced), which implies that the implementation of AFU is done by incorporating the principles into the existing programmes rather than establishing new ones and shared between staff members. Fewer of the institutions, 33.3%, on the other hand, have dedicated staff member to implement AFU activities.

**Table 5.6. Is there a dedicated staff member assigned to the AFU?**

| | N | Percent |
|---|---|---|
| Yes | 15 | 33.3% |
| | | |
| No | 30 | 66.7% |
| Observations | 45 | 100% |

**Question 7 – How many hours of work are allocated to the role?**

The number of hours varied broadly between institutions. Tables 7 and 8 show how many hours are dedicated to AFU-related tasks by those dedicated members weekly and monthly, respectively. The findings show that 1-3 hours are spent on AFU-related tasks in most cases. As shown in Table 9, these roles are typically held by academic and other staff (75%).

**Table 5.7. How many hours of work are allocated to the role? – Weekly**

|  | *N* | Percent |
|---|---|---|
| 1- 3 hours | 11 | 24.4% |
| 3- 5 hours | 3 | 6.7% |
| 5 -8 hours | 1 | 2.2% |
| 9 – 11 hours | 2 | 4.4% |
| 12 – 15 hours | 1 | 2.2% |
| 15 + hours | 1 | 2.2% |
| Observations | 19 | 42.2% |

**Table 5.8. How many hours of work are allocated to the role? – Monthly**

|  | *N* | Percent |
|---|---|---|
| 1- 3 hours | 11 | 24.4% |
| 3- 5 hours | 4 | 8.9% |
| 5 -8 hours | 2 | 4.4% |
| 9 - 11 hours | 3 | 6.7% |
| 12 - 15 hours | 1 | 2.2% |
| 15 + hours | 1 | 2.2% |
| Observations | 22 | 48.9% |

**Question 8 – Who is the role allocated to?**

The majority of respondents (91%) reported that the AFU role was allocated to several people. These included the Director of Strategic Engagement, Centre Directors, Deans, faculty teams, research teams, retired faculty staff and project managers. Although there was no indication of sole responsibility at the senior management level, the narrative

response reported that the initiative was supervised by the Provost's/President's office for most members.

**Table 5.9. Who is the role allocated to?**

|  | *N* | Percent |
|---|---|---|
| A Dean | 2 | 4.4% |
| Head of School | 2 | 4.4% |
| Academic | 13 | 28.9% |
| Senior Administrator | 3 | 6.7% |
| Other | 21 | 46.7% |
| Observations | 41 | 91.1% |

## Question 9 – In what context were the Ten Principles of an Age-Friendly University Interpreted?

The principles of becoming an AFU can be interpreted in six categories: equality, gerontology (medical), gerontology (social), humanities, technology, and health/wellness. Table 10 shows how often the principles are interpreted in the context of equality[4], gerontology (medical)[5] and gerontology (social)[6] and their perceived relevancy. The findings in Table 10 reveal that the principles are most prominently evaluated in the context of equality and gerontology (social). These findings strongly suggest that institutions opt to become age-friendly to foster equality and make a significant impact on their students and wider communities. Interestingly, medical reasons are not one of the main factors that drive the decision to become an age-friendly university/institution.

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[4] Equality highlights the growing awareness of the heterogeneity and diversity of ageing, associated inequalities and its intersectionality (Westwood, 2019).

[5] Gerontology is the science of ageing, and geriatrics is a medical discipline that deals with the diagnosis, treatment, care, rehabilitation, and prevention of diseases in older people (Grujic, 2016)

[6] Social gerontology is an area of study which focuses particularly on social relationships in old age, the social participation of older people and the protection of their individual needs. The focus of social gerontology centres on quality of life and life satisfaction from the perspective of personal resources, biographical influences and of individual ageing (Kricheldorff et al., 2015)
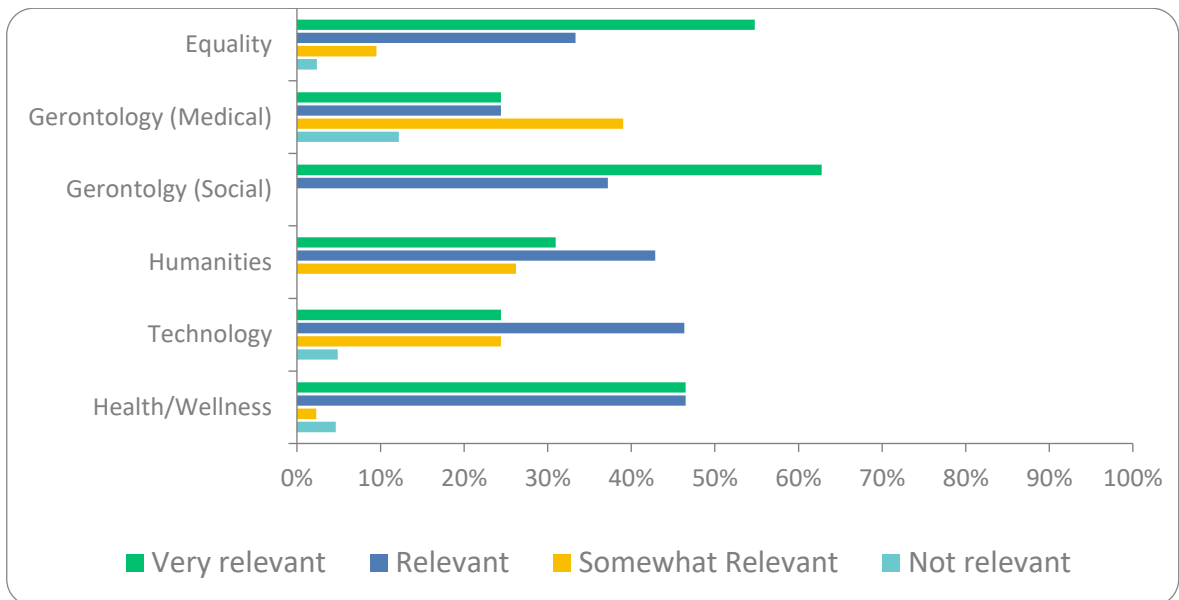
**Figure 5.2. In what context were the Ten Principles of an Age-Friendly University Interpreted?**

**Table 5.10. Interpretation of Ten Principles: Equality, Gerontology (Medical), Gerontology (Social)**

|  | Equality | | Gerontology (Medical) | | Gerontology (Social) | |
|---|---|---|---|---|---|---|
|  | *N* | Percent | *N* | Percent | *N* | Percent |
| Very relevant | 23 | 51.1% | 10 | 22.2% | 27 | 60% |
| Relevant | 14 | 31.1% | 10 | 22.2% | 16 | 35.6% |
| Somewhat Relevant | 4 | 8.9% | 16 | 35.6% | - | - |
| Not relevant | 1 | 2.2% | 5 | 11.1% | - | - |
| Observations | 42 | 93.3% | 41 | 91.1% | 43 | 95.6% |

Table 5.11 presents how often the principles are interpreted in the context of humanities, technology and health/wellness and their perceived relevancy. Similar to gerontology (social), the health/well-being of older people is one of the most prominent factors that motivate institutions to become age-friendly. The Ten Principles are also interpreted in the

context of humanities and technology but are considered much less relevant than gerontology (social), equality and health/wellness.

**Table 5.11. Interpretation of Ten Principles: Humanities, Technology, Health/Wellness**

|  | Humanities | | Technology | | Health/Wellness | |
|---|---|---|---|---|---|---|
|  | *N* | Percent | *N* | Percent | *N* | Percent |
| Very relevant | 13 | 28.9% | 10 | 22.2% | 20 | 44.4% |
| Relevant | 18 | 40% | 19 | 42.2% | 20 | 44.4% |
| Somewhat Relevant | 11 | 24.4% | 10 | 22.2% | 1 | 2.2% |
| Not relevant | - | - | 2 | 4.4% | 2 | 4.4% |
| Observations | 42 | 93.3% | 41 | 91.1% | 43 | 95.6% |

**Question 10 – Where did you hear about the AFU?**

Most respondents heard about the AFU through seminars and conferences, including 13.33% of members who joined on recommendation or were involved in age-friendly activities at a city level or a combination of the listed factors. Indeed, Table 12 shows that 60% of AFUs heard about the AFU Initiative through conferences/seminars sharing ageing research, examining the effectiveness of age-friendly policies and other membership organisations with an interest in the ageing arena and those that promote the benefits of becoming age-friendly.

**Table 5.12. Where did you hear about the AFU?**

|  | *N* | Percent |
|---|---|---|
| Website | 2 | 4.4% |
| Conferences/Seminars | 16 | 35.6% |
| Through another membership organisation | 11 | 24.4% |
| Individually promoted | 10 | 22.2% |
| Other | 6 | 13.3% |
| Observations | 45 | 100% |

**Question 11 How is the AFU Resourced in your institution?**

Most AFU activities (48.9%) are resourced from existing activities. Alternately, 17.8% of respondents reported that they were not resourced but engaged as part of their institutional service, voluntary work or received seed funding from a higher office to support their work. The way the AFU is resourced indicates that the funding may not be as relevant for the higher adoption rate among larger institutions than small ones (as shown previously in Table 3). Indeed, only 4% of the AFUs have a dedicated budget for implementing the Ten Principles and broader age-friendly policies.

**Table 5.13. How AFU is resourced in your institution**

|  | *N* | Percent |
|---|---|---|
| It has a dedicated budget | 2 | 4.4% |
| It is incorporated into existing work programmes | 2 2 | 48.9% |
| It is grant aided from external sources | 1 | 2.2% |
| Existing staff hours are allocated to it | 1 2 | 26.7% |
| Other | 8 | 17.8% |
| Observations | 4 5 | 100% |

**Direct Factors that Influence Becoming an AFU**

**Question 12 – List the factors of becoming an AFU**

The essential advantage of survey analysis is the ability to ask participants directly about the determinants of becoming an AFU. The participants were given fourteen options to rate from very important to not important, and they were also given the option to provide other potential influencing factors that determine their choice.

Factors and their relevance and importance to the institutions are presented in four tables. The first two tables, Tables 5.14 and 5.15, present the most important factors that influence becoming an AFU. AFUs choose to become age-friendly primarily to meet societal needs, provide age inclusivity on campus, facilitate intergenerational engagement, meet an

institutional mission/vision, provide equality, diversity and inclusion and improve the institution's public profile.

The following table, Table 5.16, highlights the moderately important factors influencing implementing the Ten Principles and becoming an AFU. These factors include civic engagement, increasing research opportunities, generating ageing expertise in institutions, and collaborative research with other institutions on ageing issues.

The final table, Table 5.17, shows the least important factors determining the choice to engage with the Ten Principles to become an AFU. These factors are to improve corporate social responsibility, provide sustainable development, match national policy, and corroborate the age-friendly cities programme.

Based on these findings, the institutions primarily choose to become an AFU to meet goals directly related to their ageing population at a broader level, harness the opportunities to develop and elaborate a multidisciplinary approach to ageing on campus and contribute to institutional reputation. The decision to become an AFU is research-oriented, but research-related factors are not at the top of the agenda. Interestingly, sustainability and corporate social responsibility are among the least important factors that affect the decision to become an AFU, even though the institutions choose to become an AFU to raise the institution's public profile. Finally, national goals and policies could be more decisive by aligning educational institutions with broader societal objectives related to ageing populations. By embracing the Ten Principles of an Age-Friendly University, educational institutions can play a pivotal role in shaping national policies that address the challenges and opportunities of an ageing society. These principles can drive initiatives that promote lifelong learning, intergenerational solidarity, health and well-being, economic participation, community engagement, and informed policy-making, all essential for creating inclusive and supportive environments for older people.
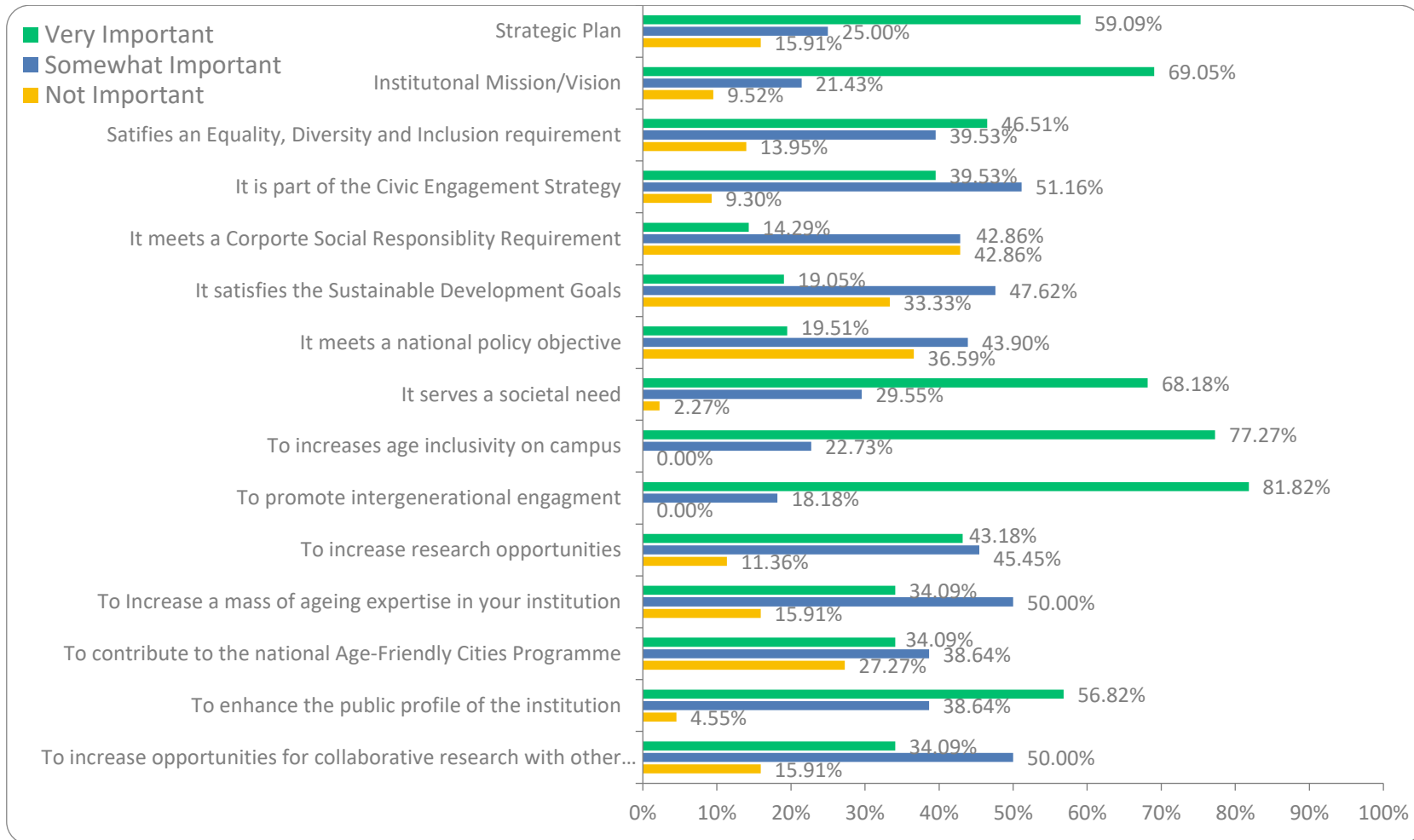
**Figure 5.3. List the factors that influence becoming an AFU**

**Table 5.14. Most Important Factors that Influence Becoming an AFU: Institutional Mission/Vision, Equality, Diversity and Inclusion and Public Profile of the Institution**

| Importance | Institutional Mission/Vision | | Equality, Diversity and Inclusion | | Public Profile of the Institution | |
|---|---|---|---|---|---|---|
| | N | Percent | N | Percent | N | Percent |
| Very | 29 | 64.4% | 20 | 44.4% | 25 | 55.6% |
| Somewhat | 9 | 20% | 17 | 37.8% | 17 | 37.8% |
| Not at all | 4 | 8.9% | 6 | 13.3% | 2 | 4.4% |
| Observations | 42 | 93.3% | 43 | 95.6% | 44 | 97.8% |

**Table 5.15. Most Important Factors that Influence Becoming an AFU: Societal Need, Age Inclusivity on Campus, Intergenerational Engagement**

| Importance | Societal Need | | Age Inclusivity on Campus | | Intergenerational Engagement | |
|---|---|---|---|---|---|---|
| | N | Percent | N | Percent | N | Percent |
| Very | 30 | 66.7% | 34 | 75.6% | 36 | 80% |
| Somewhat | 13 | 28.9% | 10 | 22.2% | 8 | 17.8% |
| Not at all | 1 | 2.2% | - | - | - | - |
| Observations | 44 | 97.8 | 44 | 97.8% | 44 | 97.8% |

**Table 5.16. Moderately Important Factors that Influence Becoming an AFU: Civic Engagement, Research Opportunities, Ageing Expertise in Institution, Opportunities for Collaborative Research on Ageing**

| | Civic Engagement | | Research Opportunities | | Ageing Expertise in Institution | | Opportunities for Collaborative Research on Ageing | |
|---|---|---|---|---|---|---|---|---|
| Importance | *N* | Percent | *N* | Percent | *N* | Percent | *N* | Percent |
| Very | 17 | 37.8% | 19 | 42.2 | 15 | 33.3% | 15 | 33.3% |
| Somewhat | 22 | 48.9% | 20 | 44.4 | 22 | 48.9% | 22 | 48.9% |
| Not at all | 4 | 8.9% | 5 | 11.1 | 7 | 15.6% | 7 | 15.6% |
| Observations | 43 | 95.6% | 44 | 97.8 | 44 | 97.8% | 44 | 97.8% |

**Table 5.17. Least Important Factors that Influence Becoming an AFU: Corporate Social Responsibility, Sustainable Development, National Policy, Age-Friendly Cities Programme**

| | Corporate Social Responsibility | | Sustainable Development | | National Policy | | Age-Friendly Cities Programme | |
|---|---|---|---|---|---|---|---|---|
| Importance | *N* | Percent | *N* | Percent | *N* | Percent | *N* | Per cent |
| Very | 6 | 13.3% | 8 | 17.8% | 8 | 17.8% | 15 | 33.3% |
| Somewhat | 18 | 40.0% | 20 | 44.4% | 18 | 40.0% | 17 | 37.8% |
| Not at all | 18 | 40.0% | 14 | 31.1% | 15 | 33.3% | 12 | 26.7% |
| Observations | 42 | 93.3% | 42 | 93.3 | 41 | 91.1% | 44 | 97.8% |

The factors influencing the rationale of becoming an AFU may also be associated with positioning and interpreting the Ten Principles. For the sake of brevity, only the most important top three factors are highlighted in Table 5.18. The importance of intergenerational engagement in the decision to become an AFU ranks high, regardless of the position of the Ten Principles in the institution. It is especially true for the institutions

where AFU is positioned within Schools/Faculty. The importance of age inclusivity on campus also exhibits a similar trend to intergenerational engagement, particularly highlighted by School/Faculty, followed by a Stand Alone Department. Finally, for the factor related to societal needs, AFU's positioning in School/Faculty ranks first again. No significant relationship differences are evident from being positioned between Stand Alone Departments, the Equality Unit or the President's Office.

**Table 5.18. Most Important Factors that Influence Becoming an AFU vs The Position of AFU in the Institution**

| Factors and Importance | | | Position of AFU in the Institution | | | | |
|---|---|---|---|---|---|---|---|
| | | | Other | School or Faculty | Stand Alone Department | Equality Diversion Unit | President's Office |
| Intergenerational Engagement | Very | Count | 17 | 10 | 4 | 3 | 2 |
| | | Expected Count | 16.4 | 9.8 | 4.9 | 3.3 | 1.6 |
| | Somewhat | Count | 3 | 2 | 2 | 1 | 0 |
| | | Expected Count | 3.6 | 2.2 | 1.1 | .7 | .4 |
| | Not at all | Count | - | - | - | - | - |
| | | Expected Count | - | - | - | - | - |
| Age Inclusivity on Campus | Very | Count | 16 | 9 | 3 | 4 | 2 |
| | | Expected Count | 15.5 | 9.3 | 4.6 | 3.1 | 1.5 |
| | Somewhat | Count | 4 | 3 | 3 | 0 | 0 |
| | | Expected Count | 4.5 | 2.7 | 1.4 | .9 | .5 |
| | Not at all | Count | - | - | - | - | - |
| | | Expected Count | - | - | - | - | - |
| | Very | Count | 13 | 9 | 3 | 3 | 2 |

157

| Factors and Importance | | | Position of AFU in the Institution | | | | |
|---|---|---|---|---|---|---|---|
| | | | Other | School or Faculty | Stand Alone Department | Equality Diversion Unit | President's Office |
| Societal Need | | Expected Count | 13.6 | 8.2 | 4.1 | 2.7 | 1.4 |
| | Somewhat | Count | 7 | 3 | 2 | 1 | 0 |
| | | Expected Count | 5.9 | 3.5 | 1.8 | 1.2 | .6 |
| | Not at all | Count | 0 | 0 | 1 | 0 | 0 |
| | | Expected Count | .5 | .3 | .1 | .1 | .0 |

**The Process of Becoming an AFU**

Understanding the processes of becoming an AFU can also be informative in elaborating on universities that have joined the AFU. In this section, I will share findings on engagement with AFU, implementation of AFU, the Ten Principles of an AFU and the details of these Ten Principles as they are analysed.

**Question 13 - Whom did you engage with to advance the AFU**

**Table 5.19. Who did you engage with to advance the AFU?**

|  | *N* |
|---|---|
| Colleagues in your School/Faculty | 24 |
| Colleagues across the institution | 35 |
| Students | 16 |
| External groups and organisations | 19 |
| Older people | 18 |
| Other | 4 |

Respondents reported interdisciplinary engagement (78%) as the most common form of interaction (Table 5.19). A small number of narrative responses (9%) included alums and broader university leadership as being engaged in the process.

**Question 14 – How did you engage?**

Table 5.20 shows that the primary engagement methods are through multidisciplinary Working Groups and internal survey/focus groups. These findings are significant because they show that the biggest challenge to becoming an AFU is involving colleagues, which presents a significant obstacle to transitioning to an age-friendly institution. As suggested in the previous section, this should be one of the key points to be addressed to improve the prevalence and efficiency of AFUs. The narrative response from open-ended questions in the survey also included conducting an environmental scan of the university, which was presented to senior management. AFU Champions who held key positions in the university, such as senior management council meetings and Working Groups, elaborated the AFU concept to colleagues.

**Table 5.20. How did you engage?**

|  | N |
|---|---|
| Convened a Working Group from your department | 9 |
| Convened a multidisciplinary Working Group | 23 |
| Convened a general meeting comprising multiple stakeholders | 12 |
| Conducted a survey or focus group internally | 17 |
| Conducted a survey or focus group externally | 6 |
| Other (please specify) | 7 |

**Question 15 – Who was responsible for the final approval to join the AFU?**

Table 5.21  shows that obtaining senior management approval is the second key obstacle to becoming an AFU. Table 5.21 shows that final approval to join AFU depends on the approval of senior management in most cases. This indicates that the transition towards an AFU significantly depends on senior management's opinion. Two respondents cited the chancellor and senate committee as giving final approval.

**Table 5.21. Who was responsible for the final approval to join the AFU?**

|  | N | Percent |
|---|---|---|
| President/Provost | 39 | 86.7% |
| Deputy/Vice President | 2 | 4.4% |
| Head of School | 2 | 4.4% |
| Other (please specify) | 2 | 4.4% |
| Observations | 45 | 100% |

### 5.3.2    *Ten Principles of an AFU*

Becoming an AFU is subject to endorsing at least one or more of the Ten Principles of an AFU. Those principles are listed in Table 1.3 p.2.

In the following sub-sections, I will investigate the interpretation and implementation of the Ten Principles and their perceived importance and usefulness in advancing and implementing the concept of an AFU.

### 5.3.3 Implementation of Ten Principles

Implementing the Ten Principles (and the extent of implementation) is closely related to interpreting these principles. In the previous section, Tables 5.10 and 5.11 (above) reveal that the Ten Principles are primarily evaluated in the context of gerontology (social), equality and health/wellness.

**Question 16 – How actively are the Ten Principles implemented in your institution?**

Table 5.22 informs us about the extent of the implementation of the Ten Principles. Most of the Principles are actively embedded throughout the School/Faculty, while at a broader institutional level, implementation of the Principles seems to happen passively. The narrative response (17.5%) provided additional insight into the operational application of the Ten Principles. Several respondents reported that the Ten Principles were sometimes but not always incorporated into decision-making; others responded that it informed programmes and practices and were incorporated into diversity, equity and inclusion policies. One respondent highlighted Principles 4 and 9 as a particular focus, while the rest reported that they were a work in progress.

These findings indicate the decentralised implementation of the Principles at each School/Faculty, but institution-wide implementation is lacking in most cases. Policies targeted towards increasing the prevalence of Institution-wide implementation should be considered to improve both the effectiveness and outlook of the Principles of AFUs.
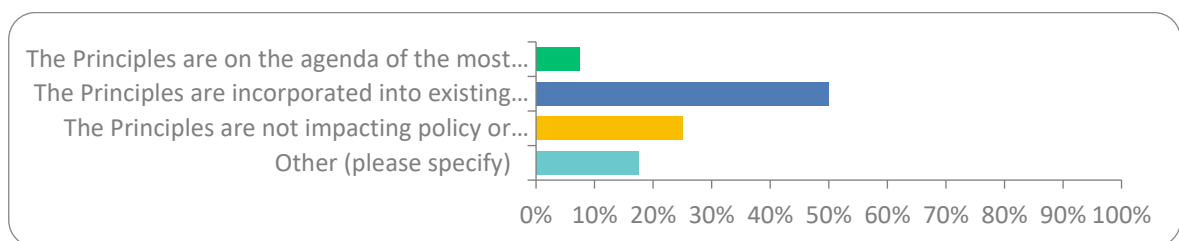


**Figure 5.4. How actively are the Principles implemented in your institution?**

Cross-tabulating the information in Table 5.13 with information in Table 5.22 shows the extent of implementation and its relationship to its embeddedness to senior management. This exercise can provide further details on the relationship between senior management and the extent of implementing the Ten Principles.

**Table 5.22. Extent of implementation of Ten Principles: Embedded throughout the Institution or School/Faculty?**

|  | Institution | | School/Faculty | |
| --- | --- | --- | --- | --- |
|  | N | Percent | N | Percent |
| Very Actively | 1 | 2.2% | 6 | 13.3% |
| Actively | 16 | 35.6% | 27 | 60% |
| Passively | 24 | 53.3% | 9 | 20% |
| Observations | 41 | 91.1% | 42 | 93.3% |

Table 5.23 shows the findings of cross-tabulating the embeddedness of the Ten Principles throughout the institution and senior management. The differences between expected counts and actual counts show evidence that the embeddedness of the Ten Principles relies on how passively or actively senior management embraces and implements the Ten Principles throughout the institution. This trend is similar to all other senior management, but some examples indicate a more active implementation of the Ten Principles throughout the institution when the President's office leads it. Very active implementation of the Principles throughout the institution is almost non-existent when led by senior management.

**Table 5.23. Extent of implementation of Ten Principles: Embedded throughout the Institution vs. Senior Management**

|  |  | The Extent of Embedded: Institutions | | |
| --- | --- | --- | --- | --- |
| Senior Management |  | Very Active | Active | Passive |
| President/Provost | Count | 1 | 14 | 20 |
|  | Expected Count | .9 | 13.7 | 20.5 |
| Deputy/Vice President | Count | 0 | 0 | 2 |
|  | Expected Count | .0 | .8 | 1.2 |
| Head of School | Count | 0 | 1 | 1 |
|  | Expected Count | .0 | .8 | 1.2 |
| Other | Count | 0 | 1 | 1 |
|  | Expected Count | .0 | .8 | 1.2 |

Table 5.24 **r**eplicates the analysis in Table 5.23 but checks the relationship between senior management and the embeddedness of the Ten Principles throughout the School/Faculty instead of using the embeddedness throughout the institution. The relationship between senior management and the extent to which the Ten Principles are implemented becomes quite different if the Principles are embedded throughout the school/faculty. When the President's office leads the initiative, it is more likely to be implemented. A similar trend can be observed for the Head of the School, while Deputy/Vice Presidents are equally active or passive in implementing the Ten Principles throughout the School/Faculty. There are some examples of passive and very active implementation of the Principles with the senior management, but the relationship is not as strong as the one with active implementation.

**Table 5.24. Extent of implementation of Ten Principles: Embedded throughout the School/Faculty vs. Senior Management**

|  |  | Extent of Embedded: School/Faculty | | |
|---|---|---|---|---|
| Senior Management |  | Very Active | Active | Passive |
| President/Provost | Count | 6 | 23 | 7 |
|  | Expected Count | 5.1 | 23.1 | 7.7 |
| Deputy/Vice President | Count | 0 | 1 | 1 |
|  | Expected Count | .3 | 1.3 | .4 |
| Head of School | Count | 0 | 2 | 0 |
|  | Expected Count | .3 | 1.3 | .4 |
| Other | Count | 0 | 1 | 1 |
|  | Expected Count | .3 | 1.3 | .4 |

### 5.3.4   *Importance of the Ten Principles*

Table 5.25 shows that the top three Principles implemented by AFUs are Principles 4, 7 and 1, respectively.

- Principle 4: To promote **intergenerational learning** to facilitate the reciprocal sharing of expertise between learners of all ages.

- Principle 7: To increase the understanding of students of the **longevity dividend** and the increasing complexity and richness that ageing brings to our society.
- Principle 1: To encourage the participation of older adults in all the **core activities** of the university, including educational and research programmes.

In Table 5.28, one can observe how often the Principles ranked regarding their importance. These findings show that Principle 1 is the most important for most institutions. Principle 4 follows Principle 1 and is followed by Principle 6. The rest of the principles are seen as less important.

These findings are significant for understanding the ability of institutions to implement the Ten Principles. If the institutions could implement the Principles as they wish, Table 5.26 would be aligned with Table 5.25. Conversely, the top three Principles implemented by AFUs would be the same as the most important three Principles for AFUs. However, the most important Principle, Principle 1, is the third most implemented Principle. This indicates the inability of some AFU institutions to implement Principle 1, which relates to the encouragement of the participation of older adults in all the core activities of the university, including educational and research programmes. Conversely, Principle 6, the third most important Principle, is not even among the top three implemented Principles.

Principle 6 relates to ensuring that the university's research agenda is informed by the needs of an ageing society to promote public discourse on how higher education can better respond to older adults' varied interests and needs. Instead, Principle 7, which is not among the most important Principles, ranks second among the top three most implemented Principles. Principle 7 relates to increasing the understanding of students of the longevity dividend and the increasing complexity and richness that ageing brings to our society. Finally, Principle 4, the most implemented Principle, ranks second most important. One can argue that AFU institutions do not have trouble implementing Principle 4, which promotes intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages. However, some institutions may find it challenging to implement Principle 6 and prefer Principle 7, which they regard as less important.

**Question 17 – Which of the Ten Principles did you implement?**

Table 5.26 shows that all principles are implemented, but there are significant differences in the implementation rates across different principles. Principle 4 (73.3%) is the most frequently implemented. This Principle relates to intergenerational learning and aligns with the interpretation of principles within the gerontology (social) context. Principle 4 is followed by Principle 7, with a 68.9% implementation rate, and relates to intergenerational aspects. Principle 1 is the third principle that scores highly on implementation. This Principle relates to including older people in the university's core activities, including educational and research programmes and again, implies that the principles are primarily interpreted in the context of gerontology (social). These findings indicate a solid alignment with social gerontology contexts.

**Table 5.25. Which of the Ten Principles did you implement?**

| Ten Principles | N | Percent |
|---|---|---|
| Principle 1 | 28 | 62.2% |
| Principle 2 | 21 | 46.7% |
| Principle 3 | 23 | 51.1% |
| Principle 4 | 33 | 73.3% |
| Principle 5 | 16 | 35.6% |
| Principle 6 | 25 | 55.6% |
| Principle 7 | 31 | 68.9% |
| Principle 8 | 19 | 42.2% |
| Principle 9 | 22 | 48.9% |
| Principle 10 | 26 | 57.8% |
| | | |

**Question 18 – To what extent have the Ten Principles been implemented?**

Table 5.27 informs us about the extent of the implementation of the Principles. Most of the Principles are actively embedded throughout the School/Faculty, while at a broader institutional level, implementation of the Principles happens passively. These findings indicate the decentralised implementation of the Principles at each School/Faculty, but institution-wide implementation is lacking in most cases. Policies targeted towards

increasing the prevalence of institution-wide implementation should be considered necessary to improve both the effectiveness and outlook of Principles of AFU.

**Table 5.26. Extent of implementation of Ten Principles: Embedded throughout the Institution**

|  | Institution | | School/Faculty | |
|---|---|---|---|---|
|  | *N* | Percent | *N* | Percent |
| Very Actively | 1 | 2.2% | 6 | 13.3% |
| Actively | 16 | 35.6% | 27 | 60% |
| Passively | 24 | 53.3% | 9 | 20% |
| Observations | 41 | 91.1% | 42 | 93.3% |
|  |  |  |  |  |

**Question 19 – What are the most important Principles in your institution?**

The two leading Principles of importance identified by respondents were Principle 1 (engaging older people in the university's core activities) and Principle 4 (promoting intergenerational learning). Engaging with the university's retired community (Principle 9) was of the least interest to the respondents.
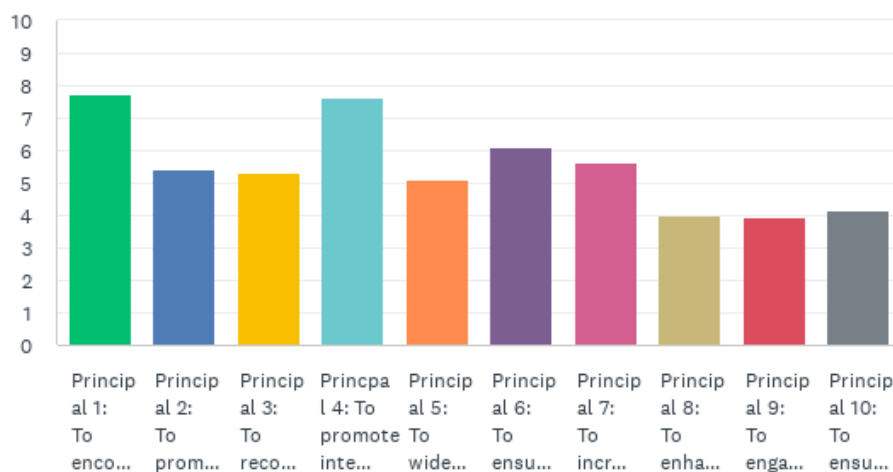


**Figure 5.5. What are the most important Principles in your institution?**

166

**Table 5.27. How often are the Principles ranked first with respect to importance?**

| Ten Principles | N | Percent |
|---|---|---|
| Principle 1 | 16 | 35.6% |
| Principle 2 | 3 | 6.7% |
| Principle 3 | - | - |
| Principle 4 | 9 | 20% |
| Principle 5 | 2 | 4.4% |
| Principle 6 | 5 | 11.1% |
| Principle 7 | 2 | 4.4% |
| Principle 8 | - | - |
| Principle 9 | 1 | 2.2% |
| Principle 10 | 1 | 2.2% |

**Question 20 – Do the Principles address all the areas you would like addressed?**

Nearly one-third of respondents (32%) indicated that the Principles covered the areas they wanted to address. In the narrative response, respondents elaborated concerns regarding addressing institutional leadership, the built environment and physical access to campuses, ageing and ableism in society, intersectionality and more emphasis on equality, diversity, and inclusion. Facilitating retired staff and extending working lives were also mentioned, in addition to addressing demographic change more broadly.

**Question 21 – Are the Principles embedded in your institution as policy?**

One respondent reported that ageing was in the foundational strategic plan of their university. However, most respondents indicated that the Ten Principles were not embedded in their institution as policy. Three respondents indicated that it was led by a gerontology centre, while three indicated that as they had only recently joined the AFUGN, the principles would be included over time. One added that they were seeking the best place to position the ten principles. One university reflected that US universities "in general do not have an age-in-everything perspective". Several respondents indicated the principles were directly embedded in an EDI (equality, diversity, and inclusion context). Most respondents reported that while the Principles were not explicitly embedded, they were implied in institutional policy.

**Question 22 – Are there any procedures in your institution to implement the Ten Principles?**

Most respondents reported that their institution did not outline procedures to implement the Ten Principles; however, they also reported working within the institutional realm to ensure the AFU Principles are implemented. Joining the AFUGN has encouraged communication and increased awareness of age-friendly activities. One university developed an AFU webpage listing resources to implement some of the Principles. Another university has a Senate committee that provides visibility and support for the AFU Principles and influences policy at an operational and strategic level.

**Challenges to Becoming an AFU**

**Question 23 – What Challenges did you encounter in becoming an AFU?**

Challenges to becoming an AFU can affect the institutions' ability to become age-friendly. Table 5.29 presents the relevance of five different challenges (potentially) the institutions face. The biggest challenge is getting colleagues involved. Implementing age-friendly policies requires consensus among colleagues, but only some are convinced about the benefits of the AFU initiative. Naturally, this can be a significant barrier towards transitioning to an AFU.

Furthermore, the institution's second most significant challenge is getting senior management approval. In addition to preventing colleagues from getting involved, senior management approval challenges can block the route towards age-friendly institutions. These findings imply that the AFU initiative should emphasise communicating policies with everyone involved in the decision-making process rather than focusing on one group of decision-makers. This reiterates Silverstein et al.'s (2019) research findings.

One interviewee commented:

> …everyone loved the idea and was supportive. However, we've had a lot of administrative turnovers, and with the pandemic, there seems to be less interest at the higher levels now as the focus is on enrolment and retention.

In contrast, the smallest challenges related to getting information on implementing the principles and getting responses from the AFU Global Office. This implies the high accessibility and good organisation of AFU initiators. Such organisation boosts the effectiveness of age-friendly policies and contributes to an increase in the prevalence of AFUs.

**Table 5.28. Challenges to Become an AFU**

| Challenging? | Info on How to Implement the Principles | | Info from Other Colleagues | | Getting Colleagues Involved | | Senior Management Approval | | Info from the AFU Global Office | |
|---|---|---|---|---|---|---|---|---|---|---|
| | N | Percent | N | Percent | N | Percent | N | Percent | N | Percent |
| Very | 2 | 4.4% | 3 | 6.7% | 9 | 20.0% | 3 | 6.7% | - | - |
| Somewhat | 14 | 31.1% | 17 | 37.8% | 14 | 31.1% | 22 | 48.9% | 6 | 13.3% |
| Not at all | 24 | 53.3% | 20 | 44.4% | 18 | 40.0% | 16 | 35.6% | 33 | 73.3% |
| Observations | 40 | 88.9% | 40 | 88.9% | 41 | 91.1% | 41 | 91.1% | 39 | 86.7% |

**Question 24 – What is your vision for AFU membership in the future?**

One respondent reflected that while the Ten Principles were considered aspirational, the AFU contributed to advancing and highlighting age-friendly activities and raising consciousness to enhance and support campus-age integration. Other respondents expressed similar responses to this question. Respondents were interested in collaborative bilateral and multilateral research and engagement opportunities within their institution and with other AFUGN members. Learning from each other, sharing resources, and developing assessment tools specific to AFU Principles were important considerations in joining the AFUGN. Developing resources and robust and sustainable infrastructures to advance the network and promote age inclusivity and visibility was also expressed. Raising age awareness within the institution and engaging with retired staff and those working in the ageing arena were also mentioned. Other respondents referred to developing relationships

and cross-institutional projects with organisations such as the WHO to promote and advance international cooperation in research and education.

**Question 25 – Should there be a membership charge to join the AFU Global Network?**

Although some respondents felt that a membership fee should be paid to sustain the AFUGN and add credibility and value, 55% of respondents did not favour a membership charge for the AFUGN; however, the narrative response elaborated on this question further. A modest professional membership fee of between €500 and €1500 was suggested by some members who also stated that a higher fee would have to reflect formal expectations, such as a governance structure, global endorsement, discount on premium access to journals, regular newsletters, webinars, and accredited online training. Several respondents articulated challenges relating to paying from their departmental budget, and others acknowledged the need for an inclusive membership model on a sliding scale or fee waiver to promote inclusivity among the members. Chapter 6 will discuss the survey findings in greater detail.
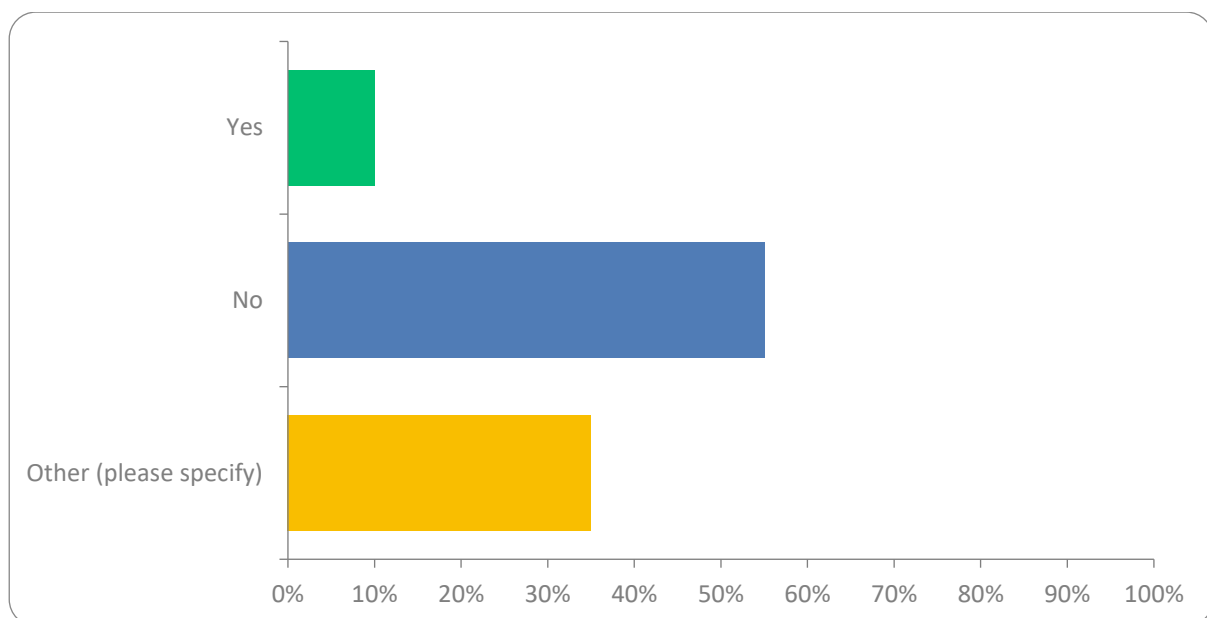


**Figure 5.6. Should there be a membership charge to join the AFU?**

## 5.5    Case Studies

Two universities that are members of the AFUGN were selected as case studies, contributing to the data triangulation and adding credibility to the research study. These were chosen due to their location in North America and Europe and the length of time they have been members of the AFUGN. Another factor for selecting these examples is the difference in cultural approaches to ageing policies. Perek-Bialas et al. (2006) designed an intercultural tool to compare European active ageing policies. While the research focused on the Czech Republic and Poland, it interrogated active age policies in European societies, recognising the need to appreciate country-specific problems and the regional character of demographic change. Similarly, research carried out in Canada (Löckenhoff et al., 2009) found that while there are individual differences *within* cultures, there is also a difference *across* cultures.

Cultural approaches and attitudes towards ageing in Canada and the Czech Republic differ, reflecting each country's unique societal values, historical contexts, and demographic trends. These have been outlined below:

**Table 5.29. Cultural Differences Towards Ageing in Canada and the Czech Republic**

| Canada | Czech Republic |
|---|---|
| **Multicultural Perspectives**: Canada is known for its multicultural society, which includes a wide range of attitudes toward ageing. These perspectives are influenced by the diverse cultural backgrounds of its population, including Indigenous peoples and immigrants from around the world. | **Traditional Respect for Older People**: The Czech Republic has a strong cultural tradition of respecting older people. Older people are often valued for their wisdom and experience, and there is a cultural expectation that younger family members will care for their ageing relatives. |
| **Respect and Independence**: Many Canadian families strongly emphasise respecting elders while promoting independence. This includes encouraging older people to live independently for as long as possible, often with the help of home care services or senior living communities. | **Family-Oriented Care**: The Czech Republic places a significant emphasis on family-based care. Many older people live with their families or are close to them, and family members are often expected to take on caregiving roles. |
| **Active Aging**: Canada promotes the concept of "active ageing," encouraging older people to remain physically, socially, and intellectually engaged. Many programs and initiatives aim to promote | **State Support and Pensions**: The Czech social welfare system includes pension schemes and healthcare support for older people. However, compared to Canada, there may be fewer resources |

| Canada | Czech Republic |
|---|---|
| health, wellness, and lifelong learning among older people. | for active ageing initiatives, and the focus is often more on providing basic care and support. |
| **Social Support Systems**: The Canadian government provides extensive social support systems for older people, including healthcare services, pension plans, and community resources. It also focuses on protecting the rights of older people and addressing issues like elder abuse. | **Cultural Activities and Community Engagement**: While there may not be as many formal programs promoting active ageing as in Canada, there are still opportunities for older people to engage in cultural activities and community life. Traditional events and festivals often include active participation from older people. |
| **Intergenerational Integration**: Many Canadian communities and programs aim to integrate different generations, fostering mutual respect and understanding. This can be seen in initiatives that unite young and older people for various activities and projects. | **Evolving Perspectives**: As the Czech Republic continues integrating into the European Union and the global community, attitudes towards ageing are evolving. There is increasing recognition of the importance of promoting healthy and active ageing, although traditional views on family care remain strong. |
| **Diversity in Care**: Due to Canada's multicultural nature, there is an emphasis on providing culturally sensitive care for older people. This includes offering services that respect the cultural and linguistic needs of older people from diverse backgrounds. | |

In summary, Canada and the Czech Republic value their older populations but approach ageing from different cultural and structural perspectives. Canada emphasises independence, active ageing, and multiculturalism, with robust social support systems and a focus on integrating seniors into the broader community. In contrast, the Czech Republic emphasises family-based care and traditional respect for older people, with growing attention to adapting social services to an ageing population. Both countries increasingly recognise the importance of supporting the well-being and dignity of older adults (Torres, 2011; Canada, 2024)

Both countries' unique cultural attitudes towards ageing will shape the development of AFU initiatives. Canada's multicultural and active ageing approach may lead to more diverse and inclusive programs emphasising health, independence, and lifelong learning. In

contrast, the Czech Republic's traditional respect for older people and family-centred care may result in initiatives that integrate older people more deeply into the social and educational fabric of the university, highlighting intergenerational relationships and family support.

The case studies commenced by interviewing three staff members from McMaster University who have been coded (McM1, 2 & 3) and one from Masaryk University MUNI (MU1); all are in leadership positions and engaged in ageing research, education, and social gerontology and civic engagement. McMaster joined the AFUGN in 2017, and Masaryk joined in 2021. The interviewees also have expertise in the age-friendly arena in their institution. The interviews present their perspective on the influencing factors and processes explored by each institution to inform joining the AFUGN and cite examples of how the Principles were approached and implemented.

### 5.5.1 *Approach to the Document Analysis*

Documentary analysis is presented throughout the case studies of both institutions, and key university documents are referenced throughout the text. While this complementarity approach recognises that this data provides insight into the process, it does not add to a rounded unity (Brannen, 1995). Still, it corroborates and deepens the value of the survey and case studies (Bardach & Patashnick, 2016) and the explicit meaning of the data (Braun et al., 2019). Documents reflected when the institutions joined the AFUGN and more recent activities demonstrating their ongoing commitment to the Ten Principles.

The case studies explore the influencing factors, process and implementation of becoming and remaining an AFU. Analysing and coding the interviews were cross-referenced to the survey findings and presented in order of relevance. Appendix 5.2 provides a comprehensive list of documents selected and data analysed, which have also been referenced throughout the case studies.

*5.5.2 Case Study A: McMaster University, Hamilton, Canada*

**Background**

McMaster University was founded in 1887 in Toronto with a bequest of $900,000 from the estate of Senator William McMaster. The first three Faculties were Arts, Science, and Divinity. In 1930, the university relocated to Hamilton in Ontario, Canada. Hamilton's population is half a million, and it is the ninth-largest city in Ontario. McMaster University is among the top 80 universities worldwide, 1st in Canada, and 4th in the Times Higher rankings (Times Higher Education, 2024). It has a student population of 31,000 undergraduate students, 10% of whom are international students representing 139 countries. It has 191,000 alums. In 1965, it established a medical school and teaching hospital pioneering "problem-based learning," known worldwide as the "McMaster Model" (McMaster University, 2022). It is a research-intensive university committed to solving real-world challenges to advance its communities' social and economic impact. Staff have been awarded Nobel prizes for Peace, Economics and, most recently, Physics. McMaster aims to advance human and societal health and well-being (McMaster University, 2022). Its reputation is built on multidisciplinary collaborative responses to the world's complex challenges to improve people's lives and contribute to the global knowledge base. It was an early adopter of the Ten Principles of an AFU and joined the AFUGN in 2017.

The initial approach to joining the AFUGN was initiated by the McMaster Institute for Research on Ageing (MIRA). The university had a broad range of multidisciplinary activities (listed below) relating to ageing research, and an initial review of these confirmed relevant alignment with the Ten Principles. MIRA led the process and started auditing existing activities on the McMaster campus to identify relevant operational areas.

**McMaster Institute for Research on Ageing (MIRA)**

McMaster University's cross-faculty research institute, McMaster Institute for Research and Ageing (MIRA), is committed to advancing the science of ageing. Ageing is a normal process that every individual or being faces over time. The rising age of individuals can impact individuals, families, and communities (Our Story McMaster University, 2022). As the ageing population increases in Canada, MIRA has been involved in age-related activities and initiatives to empower older people and influence positive and active ageing to inform

better health outcomes. MIRA believes that older people's groups play a crucial role in stabilising society. To support them further, McMaster University joined the AFUGN in 2017 (McMaster University, 2017). As an established Institute for Research on Ageing, the concept aligned with several critical areas of institutional focus more broadly: Participation in the AFUGN aims to proactively address the challenges and harness the opportunities for the ageing populations. Since the establishment of MIRA in 2016, it has been instrumental to McMaster University significantly contributing to the ageing research domain by facilitating better coordination, facilitation, and acceleration of ageing research across all university faculties.

**MIRA's Approach**

MIRA's research philosophy and practice is to engage in integrated research initiatives by considering diverse biological, technological, environmental, and behavioural factors impacting people as they age. Emphasis is placed on a collaborative and coordinated research agenda between experts such as clinicians and academics from different faculties to ensure that the research initiatives provide robust results. The application of design thinking is critical as it helps the Institute to generate human-centred solutions for an ageing population. To ensure regular and consistent progress, MIRA focuses on ongoing stakeholder interactions, including policymakers and older people (Our Story McMaster University, 2022). MIRA has significantly contributed to the ageing sector by instigating several initiatives and programs. It offers a broad range of resources at a community level to improve the quality of life, showcasing the significant contributions of MIRA to the ageing agenda in Canada. Additional information on MIRA's approach is outlined in Appendix X.

**Factors informing the decision to join and remain an AFU**

Drawing on documentary analysis and case study interviews, the following factors were identified as relevant to joining the AFU following discussion and surveys with stakeholder groups. A working group led by two senior staff members who worked in the ageing sector was established to map out the activities and opportunities within the university. Their goal was to examine the influencing factors and benefits of joining the Age-Friendly University (AFU) initiative. This group compiled a report for senior management, presenting a detailed rationale for the university's participation in the AFU.

**Ageing in Higher Education**

Engagement is one of two key pillars at McMaster University, reiterated by McMaster's President, Professor Patrick Dean, upon joining the AFUGN

> Our interest in joining the network emerged because collaboration and community engagement are two key pillars at McMaster….By working together with our institutions, we can advance our mutual goals and have a positive impact on today's ageing population, as well as the growing population of older adults worldwide (McMaster University, 2019).

The Ten Principles of an Age-Friendly University underscore the importance of explicitly including ageing as a research focus, with a particular emphasis on addressing ageing within the context of higher education, which is articulated in  McMaster's strategic plan that human and societal health and well-being depend on sharing creative, diverse thoughts and ideas (Our Story McMaster University, 2022). This initiative encourages the university to integrate ageing more prominently into its research agenda and educational programs.

> ….there was not much appreciation given to, not what ageing is within the university system. They knew the demographic, but what use and opportunities or challenges might there be for ageing individuals?" (McM1).

It was further elaborated and led to discussions (AFU McMaster Committee Meeting Notes, 2019) on how McMaster could play a more significant role internally and externally in promoting ageing.

> We started a conversation on what role McMaster can play internally and externally to promote ageing, and an age-friendly university was part of it (McM2).

**Sustainable Development Goals (SDG)**

Universities have a clear role as enablers for the SDGs (UN, 2016) and help countries respond to ageing-related challenges through Science, Technology and Innovation (STI) programmes. McMaster is well-positioned to address global goals in four main areas: teaching and learning, research, governance, and public engagement.

These four areas are sub-categories of their overarching purpose, ultimately serving society. At McMaster, the development goals drive their work through service to society and their contributions to building a better world (SDGs McMaster University, 2018).  As

universities globally sought to ensure their compliance with the SDGs, the Ten Principles offered a mechanism to realise compliance with them:

> We think this (AFU) is important. It also aligned with the sustainable development goals that the university was promoting at that point in time (McM1).

## Branding and Value

McMaster's vision statement referred to a commitment to

> achieve international distinction for creativity, innovation and excellence and mission as a purpose towards discovery, communication, and preservation of knowledge. In our teaching, research, and scholarship, we are committed to creativity, innovation, and excellence. We value integrity, quality, inclusiveness, and teamwork in everything we do. We inspire critical thinking, personal growth, and a passion for lifelong learning. We serve the social, cultural, and economic needs of our community and our society" (Ministry for Education and Skills Ontario, 2017).

Endorsing the Ten Principles offered a good branding opportunity and the added value of meeting the aspirations exemplified in their vision and mission. It was highlighted by one of the interviewees who said

> it gave them (senior management) the opportunity to indicate how they are embedding the university into the community's cultural value (McM1).

McMaster has maintained this approach in its updated vision statement:

> Impact, Ambition and Transformation through Excellence, Inclusion and Community: Advancing Human and Societal Health and Well-being, and its Mission Statement refers to the discovery, communication, and preservation of knowledge. …. critical thinking, personal growth, and a passion for lifelong learning. We serve the social, cultural, and economic needs of our community and our society (McMaster University, 2023).

## Educating staff and Students about Ageing

MIRA's role within McMaster University identified a need for the university (e.g., senior management, staff and students) to be **educated about the issues of an ageing population and** the **intergenerational** aspects of ageing, which also aligned with the university's vision statement reflecting a commitment to lifelong learning and scholarship (McMaster University, 2017)

177

We thought the university's student body should learn something about ageing, age-friendly communities and what role they can play as students at the university - to play a role in intergenerational ageing (McM1).

**Open Door – Welcome**

McMaster's commitment to the student experience outlined various approaches to improving opportunities and promoting outcomes and successes (McMaster University, 2017).  A Statement on Building an Inclusive Community with a Shared Purpose (2010) reinforced the university's commitment to "the values of respect, collaboration, diversity and dedication to building an inclusive community that has meaningful representation at all levels and in all constituencies on campus of the diversity evident in the wider community." These were informed and elaborated on in a new strategic plan in 2023 to reflect McMaster's commitment to ensuring three essential factors to welcome students and participants to the university. These are outlined below:

**Table 5.30. Three essential factors to welcome students and participants to the university Building an Inclusive Community with a Shared Purpose (2010))**

| |
|---|
| - Promotion of health and well-being that acknowledges an understanding of a spectrum that spans more than physical and mental well-being but also acknowledges that the health and safety of the campus community is a collective commitment and shared responsibility. |
| - Academic preparedness is needed to develop a sense of self and belonging, understand the complexities of ageing, and discover that learning is fluid as one starts to explore one's educational journey. |
| - Advancement of equity and inclusion is needed to create a welcoming and diverse campus where all can challenge their personal biases and privileges and get support through various on-campus resources. All members of the McMaster community share the responsibility to uphold the principles of equity, diversity, inclusion, and accessibility (McMaster University, Office of Student Affairs, 2023) |

The Ten Principles highlighted opportunities to make the University more welcoming.

> And I think it also helped us to look at our organization and say, you know, maybe when you talked about civic engagement, it was also about how do we make our organization more welcoming too because, you know, we talk about that kind of stuff all the time, but where is the energy, where is the momentum? (McM2).

## Research Collaboration and Expertise

McMaster's research strategy (Research Office for Administration, Development and Support, McMaster University, 2018) reflected a commitment to pursuing current and emerging social and economic issues of relevance to their local and global communities and collaborating with many other academic institutions around the globe, as well as numerous industrial, government, and community partners (Ministry for Education and Skills Ontario, 2017). The Ten Principles provided opportunities for **collaborative research**, highlighted institutional expertise and metrics for **measuring success** and **learning from others.**

> "One of the attractions was making international connections so that we could have increased access to partners. It was also about the university being recognised as a key driver of some of the research intensity and wanting to draw attention to that…we wanted to promote what we were doing at MIRA and how important this is to other organisations…and how we are contributing to that and look at what the value of this would be" (McM1).

McMaster has continued this strategy, as their research productivity consistently ranks McMaster among Canada's most research-intensive universities. An interdisciplinary research approach continues to be an integral part of their culture. It is a hallmark of their research brand and a focus of their broader influence and impact on societal demands that they use their knowledge for social, cultural, and economic development (McMaster University, 2023).

## Community, Co-created Design, Equality, Diversity, and Inclusion

McMaster Community Engagement Strategy was reflected in its mission to "serve the public good through innovative research, industry collaborations, and engagement with our local, provincial, national, and global communities" (McMaster University, 2017). Their Shared Purpose Statement (2010) committed to "building an inclusive community that has meaningful representation — at all levels and in all constituencies on campus — of the

diversity evident in the wider community." The generic aspect of the Ten Principles contributes toward developing and supporting multi-stakeholder collaboration because various perspectives, skills, and approaches are required to address the complex challenges facing communities and highlight a deficit in equality, diversity, and inclusion issues. The interviewees reflected the following:

> That's what allowed us to bring some of the community people to the table as well because, uh, principals of the age-friendly universities are one thing, but we want to extend that the university is part of a larger community (MCM1).

> But then also about creating a community. So, we were trying to learn how to engage with members of our local community and do some co-creation and participatory research so that older people could inform the research (McM2).

> They are obsessed with EDI, but from getting the staffing balance right, they are not thinking about EDI from the perspective of intersectionality (McM1).

> How do you bring equity, diversity, inclusion, and training to work with older people? Right? So, the emphasis was not age-friendly, it was not age-inclusive, and I think that's an interesting premise. We are doing it, but not sort of equating that - maybe this is the better terminology to use (McM1).

McMasters most recent Community Engagement Strategy (CE) focuses on six key areas: relationships; reciprocity; equity; continuity; openness to learning, and commitment to act, which involves "performing research, teaching, and service for or with community members and partners for the public good" (CE, McMaster University, 2022) which remains relevant to the Ten Principles.


**Accessibility**

While there was no explicit evidence relating to McMaster's accessibility policy, it was implicit in their Shared Purpose Statement (2010). More recently, McMaster adopted the definition set out by Accessibility Services Canada (2023), which defines **accessibility** as the design of products, devices, services, or environments for people who experience disabilities. Ontario has laws to improve accessibility for people with disabilities, including the Accessibility for Ontarians with Disabilities Act (AODA; Accessibility Directorate of Ontario, 2005), the Ontario Human Rights Code (Ontario Human Rights Commission, 1962), and the Ontario Building Code (Ministry for Municipal Affairs and Housing, 2019). These codes are observed by McMaster's Accessibility Hub (Equity and Inclusion Office,

McMaster University, 2022). However, the intersectionality around ageing within McMaster was overlooked. The Ten Principles offered a mechanism to spotlight **accessibility** deficits:

> So, like, accessibility is a huge topic, right? We have an accessibility committee, and we have a group just focused on web accessibility. Like, there's all this kind of stuff. Nobody talks about it from an ageing individual perspective; it's just accessibility, so I think there are some things embedded, but they are not necessarily explicit; you have to look for them to say, okay, this is not necessarily under the AFU umbrella…my job as a lead on this is to address the priority that addresses those principles, if you'd like, decide which comes first (McM2).

> We were able to measure ourselves against the principle and then say, this is where we need to grow and improve, and this network will help us get there. So, to be able to learn from other organizations and how they were being successful at some of those was going to help us address our own gaps as well. Right? But it also gave us a measuring stick…and gave the university a set of criteria to think about and move forward. I think it, it just sort of gave us a bit of a, like I said before, a measuring stick, but also a bit of a, something to strive for and not to just create the wheel by ourselves but to look at how were other people successful around that table and feeling like you were part of a community, felt really good at that time (McM2).

McMaster explicitly states its commitment to advancing research and being globally engaged: "we're no ivory tower. Our dynamic network of students, researchers, faculty and alumni connects and collaborates with the community and the world at large" (Our Story McMaster University, 2022). The Ten Principles challenged the "**ivory tower**" perception to ensure the Institute was situated in the lived community:

> We wanted our Institute to be situated within the community where we live rather than a university like an ivory tower type of Institute (McM1).

**Future Ambitions**

The Okanagan Charter (2017), signed by McMaster provides guidance and inspiration by providing a framework to promote the importance of health and well-being in higher education institutions and dovetails with elements of the Ten Principles and could easily be interpreted in alignment with the Charter.

> part of our university that we've signed on to what's called the Okanagan charter… it's focused on health and wellness, and every year they offer five, $5,000 prizes to do something related to health and wellness across the university… I would really like to do something like that with age-friendly, find $5,000 to get someone to do something new and age-friendly (McM3).

**An Age-Friendly Approach**

Through the framework of the Ten Principles and the WHO Age-Friendly World (WHO, 2007), the stakeholder group identified a need to embrace the broader age-friendly thematic approach to ageing at a fundamental level, starting with outdoor buildings and spaces and transport issues:

> We discovered we needed better wayfinding, better signage (McM2).

**Process of joining AFUGN**

**First Steps – Stakeholder Survey & Consultation**

To better understand McMaster University's strengths in relation to the process and interpreting the Ten Principles of an AFU, the research staff of MIRA conducted an exhaustive survey of the McMaster community. The survey included external stakeholders, staff, faculty members, alums, students, and the residents of Hamilton. Their approach included a review of their public realm, including transport, the built environment, and the broader community.

 Focus group discussions were also held to carry out the research activity at a comprehensive level, which helped MIRA identify areas with well-developed programming and research aligned with the AFU network. Internal documents and transcripts of meetings detailed in the documentary analysis outlined the various processes and discussions that informed their application to the AFUGN and their decision to join. Interviews with staff involved in driving the project articulate the narrative discussion.

Respondent McM1, responsible for the process, said:

> We started a conversation on what role McMaster can play internally and externally to promote ageing, and an age-friendly university was part of it.

The Vice President of Research championed the AFU concept, engaging different departments in the process, and a committee was convened to explore opportunities to implement the Ten Principles. In August 2017, McMaster formally applied to DCU to join the AFUGN (Deane, 2017) and was accepted into the global network by the Vice-President of External and Strategic Affairs (Holmes, 2017). In a comprehensive

application to join the AFUGN, McMaster committed to endorsing all Ten Principles. They outlined their interest in joining the network, which emerged through their understanding of the importance of collaboration and community engagement, two critical pillars at their institution. They reiterated an acknowledgement "that working together to advance mutual goals to positively impact today's ageing population and the growing population of older adults worldwide". In their application letter, they provided three examples of their approach (Principles 1,7 and 9), reiterating a commitment to all Ten Principles and outlined future plans (Deane, 2017).

**Table 5.31. Examples of the Principles in Practice at McMaster University (Deane, 2017)**

| Principle | Practice |
|---|---|
| 1. To ensure that the university's research agenda is informed by the needs of an ageing society and to promote public discourse on how higher education can better respond to the varied interests and needs of older adults: | The University has declared that ageing is a key research priority across the campus and supports multiple opportunities to engage with older adults at all stages of the research process. This is facilitated by their overarching organization, MIRA, as well as key platforms such as the Canadian Longitudinal Study on Ageing and the Gilbrea Centre, each with its network of older adult participants.<br><br>They have also supported several knowledge translation activities so that evidence is closer to the citizens themselves, such as the McMaster Optimal Ageing Portal. Finally, the McMaster Health Forum has hosted many dialogues and debates about the needs and interests of older adults, resulting in resources that are shared with key decision-makers, including university researchers and government policymakers, and the MacSeniors program enables more than 200 seniors to engage in a supervised exercise and wellness program and promotes mobility and independence. |
| 7. To increase the understanding of students of the longevity dividend | McMaster has a robust educational program in health, ageing and society, as well as gerontology. Ageing is also critical to their health professional programs, including medicine, nursing, and |

| Principle | Practice |
|---|---|
| and the increasing complexity and richness that ageing brings to our society: | rehabilitation. Through MIRA, they are currently investing in approaches to build capacity among their students and broaden their exposure to critical issues facing their ageing population. |
| 9. To engage actively with the university's own retired community: | McMaster has a very active group of retired staff and faculty, the McMaster University Retirees Association. This group engages in multiple campus activities and continues to provide insight into how older people can provide rich mentorship and community engagement opportunities. |

Presentations and meeting notes document the discussions and progression of implementing the Ten Principles (AFU McMaster Committee Meeting Notes, 2019; Raina, 2019). These outlined the activities in the university in addition to a presentation on why McMaster should join the network. Surprisingly, there were few objections to endorsing the Ten Principles or joining the AFUGN. Contrary to concerns anticipated by the AFU Champion, most staff did not know about the age-friendly movement, but the group agreed to implement a survey (Ward, 2019) at the outset and discuss concerns from the leadership about both the practical aspects of joining the AFUGN and more broadly how would it benefit McMaster as exemplified in the following interview quotes.

> We did survey our members in different departments at some point in time, like what people knew about age-friendly, and to my surprise, it was not a large number of people who actually have paid attention to it, and, it would be good to think about doing another survey and see if we changed the people looking at X, Y, and Z, and then if the knowledge base has changed.. that would be interesting.
>
> There were questions from the leadership as well on some of the principals. I don't remember what the exact questions were there, but that they required clarity…it was a healthy discussion. We don't do anything half big, we took on the opportunity of leadership support and said, let's go….(endorsed all Ten Principles) (MCM1).

**The outcome of Mapping the Ten Principles**

The solid review and contribution by MIRA, who mapped the Ten Principles to existing activities, helped the university identify three areas that need further improvement: **communication** and **outreach**, **accessibility** and **inclusion** and **programming** and **engagement**. These were addressed by developing new programmes and adopting an explicit approach to engagement and research, elaborated below.

The Ten Principles of an AFU are universally adopted throughout McMaster University (2017), and explicit examples of their work are outlined below. They also reviewed the Ten Principles in 2019 to evaluate their implementation and adoption throughout McMaster (Ward, 2019b). Additional information is documented in Appendix Z.

**Table 5.32. Principles in Order of Priority at McMaster University**

| Ten Principles of an AFU | McMaster University, Hamilton Canada |
|---|---|
| 1. To encourage the participation of older adults in all the **core activities** of the university, including educational and research programmes. | Priority |
| 2. To promote personal and career development in the second half of life and to support those who wish to pursue "**second careers.**" | Priority |
| 3. To recognise the **range of educational needs** of older adults (from those who were early school-leavers through to those who wish to pursue Master's or PhD qualifications). | Priority |
| 4. To promote **intergenerational learning** to facilitate the reciprocal sharing of expertise between learners of all ages. | Priority |
| 5. To widen access to **online educational opportunities** for older adults to ensure a diversity of routes to participation. | Priority |
| 6. To ensure that the university's **research agenda** is informed by the needs of an ageing society and to promote public discourse on how higher education can better respond to the varied interests and needs of older adults. | Priority |
| 7. To increase the understanding of students of the **longevity dividend** and the increasing complexity and richness that ageing brings to our society. | Priority |
| 8. To enhance access for older adults to the university's range of **health and wellness** programmes and its **arts** and **cultural activities**. | Priority |
| 9. To engage actively with the university's **retired community.** | Priority |
| 10. To ensure regular **dialogue** with organisations representing the interests of the ageing population. | Priority |

**Overall Approach to Applying and Implementing the Ten Principles 2017 - 2021**

Since joining the AFUGN, a university-wide stakeholder group met yearly to review the AFU activities and identify areas of development and implementation (AFU McMaster Committee Meeting Notes, 2019, 2021, 2022). The group has a dedicated AFU Coordinator. A review of the documents and website updates demonstrates McMaster's commitment to actively exploring ways to ensure the Ten Principles are implemented in the university (Raina, 2021).

All three respondents from McMaster University identified many opportunities to broadly apply and implement the Ten Principles.

**Engagement**

As reflected in the McMaster Community Engagement Strategy (2022), the Ten Principles informed an approach to engaging meaningfully with the broader community and connecting them with McMaster.

> We've built an age-friendly university committee, which brings together 42 partners on campus on a semi-regular basis to meet about age-friendly initiatives on campus. And we've recently transitioned to a community of practice model, which we found actually produce much better results in getting people to connect (McM3).

> "we've been doing a good job of expanding our community partnerships….we've tried to do a good job of keeping those network relationships up and keep them involved in our design thinking activities and co-design projects, and so we had a really good meeting with the dementia friendly communities group, and we were able to connect them with a whole bunch of partners on campus who are interested in bringing dementia friendly training to their students, to their groups, to their employees (McM3)

**Walkability Survey and the Built Environment**

A walkability survey of the campus by the Planning Department generated several ideas which were implemented as they considered new ways to make the campus more accessible (McMaster University, 2019).

> We discovered we needed better wayfinding, better signage and the Walkability Study gave us...a measuring stick, something to strive for (McM1).

So they looked into how to use student volunteers to pick up people from remote parking lots in golf buggies and bring them to where they needed to go…and our working with the university to design a space specifically for intergenerational activities… it's taking a bit of time because building approvals always do in Canada …and that's been codesigned with input from both students and older adults in an intergenerational co-design session. And yeah, so we're working with facility services to overcome some accessibility challenges (McM3).

**Student Training**

A funding application to research digital health and ageing specifically in the context of training for students for an age-inclusive approach did not particularly emphasise age-friendly. The Gilbrea Research Centre at McMaster supports students who are studying ageing (2021). However, as respondent McM1 observed, these opportunities reinforce MIRA's need to challenge institutional bias towards an age-friendly university.

"It pushes every faculty member to think from that perspective (age-friendly). We are all about design thinking. We always want the stakeholders around the Table, including older people and their family members. So those things percolate in our ethos now (McM1).

**New Educational Programmes and Research**

MIRA's focus and approach to implementing the Ten Principles have been reflected by extending valuable support to its partners at the university and community levels so that the educational programs relating to ageing can be expanded and new research opportunities explored:.

our research has always been important when we surveyed our university it has always been a leading strength, we're doing well in that area. We have lots of research on ageing. Over 200 researchers are involved in various research projects on ageing. That's definitely been a strength., and we've continued to see that interest grow.  We've seen continued growth in that area and some growth and training opportunities for students (McM3).

Some of the significant educational programs which have a genesis in the Ten Principles on the campus of McMaster University with the support of MIRA include:

*Intergenerational Social Programming*

*Meet My Hamilton* is a component of MIRA's intergenerational activities. The program has been designed to allow older adults and undergraduate learners to have meaningful

conversations, establish new relationships and learn more about one another (McMaster University, 2022). The program is unique because it creates a common platform where students and older community members interact with each other and share their life experiences and interests. Virtual and in-person intergenerational activities are arranged, enabling students to engage with community members 65 years or older. MIRA introduced the program to facilitate and support the development of new friendships between generations. The program adds value for learners by facilitating community engagement, effective communication and intergenerational relationship building.

> Changes that have been instituted at the university under the Ten Principles since we joined the age-friendly university has been the continuation and introduction of new social and recreational programs for older adults (MCM3).

> A physical activity centre, specifically focused on seniors and that's continued to run and became virtual during the pandemic (McM3).

> We introduced an intergenerational social program that was initially designed as in-person, but went virtual as well during the pandemic. So that's something we got to do (McM3).

> "Our continuing education centre has continued to expand both its in-person and virtual offerings for older adults, mostly virtual right now; obviously, we continue to expand our programming on campus for older adults (McM3).

Other programmes which are elaborated on in Appendix X include the

- Mc Master Passport to Geriatric Education, an online passport for learners interested in ageing, geriatrics and elder care (McMaster Institute for Research on Ageing, 2021)
- The Caregiving Essentials Course from McMaster University's Continuing Education is an 8-week online program tailored for primary caregivers (McMaster University, 2021).
- MIRA partnered with the CIHR Institute of Ageing to host the 2021 CIHR Institute of Ageing Summer Program in Ageing, held virtually from May 02 to May 12

- McMaster University initiated the "Niagara Stories Project," using storytelling to build connections and combat loneliness among seniors.

*VOICE Project*

The Ten Principles exemplify McMaster's strong research focus through collaboration with Newcastle University on the "Voice" project (Newcastle University, 2022). "VOICE" is a platform that provides insights, ideas, and knowledge to help shape health research and improve products and services to help people live longer, healthier, and happier lives. It is reflected in the approach towards student education programmes and broader training across the university.

**Challenges to Applying the Ten Principles**

From an individual perspective, all three contributors to the McMaster case study experienced varying challenges in applying and advancing the Ten Principles. It appears to be linked to the hierarchical role within the structure of McMaster and their interaction with colleagues in their sphere of expertise.

**Financia**l

McMaster set out its finance strategy under four key areas outlined below:

**Financial Affairs Responsibility Quadrants**

**Strategist**

Focus on managing future directions in a financially prudent way by ensuring **informed strategic decision-making** and integrating sound **project and performance management**.

1. Support government priorities
2. Advance alternative revenue generation initiatives
3. Advance ancillary operations
4. Partner and optimize social media outreach

**Stewardship**

Focus on accounting, risk management, and the preservation of assets. This focus includes **ensuring compliance** with reporting requirements, legislative directives, and **effective internal controls**.

1. Provide reliable financial information modeled to user needs
2. Ensure accounting control and compliance aligns to Enterprise Risk Management
3. Ensure Ancillaries balance and meet targets

**Operator**

Focus on **people** and process efficiencies with a responsibility to balance cost with valued services. This focus includes talent management, and student, faculty, staff, and community service.

1. Empower employee engagement and support priority actions
2. Be University community connected
3. Be City community connected
4. Use feedback mechanisms to anchor priorities

**Catalyst**

Focus on lean six sigma systems and process initiatives that **engage stakeholders,** leads positively, communicates broadly, and works to **align processes** across the university.

1. Initiate projects focused on efficiency, integration, and alignment
2. Coordinate initiatives across the academy and administration
3. Be mindful of Sustainable Development Goals when planning changes
4. Consider evolving practices within and outside Higher Education

**Figure 5.7. Financial Strategic, Strategic Plan (Financial Strategy, McMaster University, 2022)**

The operator component of the strategy elaborates on the initial four items, which include commitments to advance diversity across the portfolio and engage in city priorities and opportunities with the launch of Cycling without Age and other marginalised groups. However, while there is a support structure, competing interests by other initiatives present challenges:

> I think our main problem, which is common to so many universities, is getting institutional funding to get initiatives going. I find generally, our university is quite supportive and interested in activities, but , without central funding, it can kind of be difficult to get people on board to use their own funds or time to do things (McM3).

> So for the people who are already doing things - great, and also people are happy to align the work they're already doing with the initiative, but to do new things has, and will be challenging without money (McM2).

**Communication**

A study by Calonge et al. (2021) on strategies in higher education reflects broadly that many organizations do not harness and use their communications platforms effectively or to their full potential. Knobel and Reisburg (2022) support this claim and assert that

effective external communication must be considered a fundamental responsibility of a university to connect, engage, and actively participate in the public sphere as a reliable source of information. It is similarly true of McMaster University, which, despite having a dedicated Office of Public Relations ( 2022), a detailed Marketing and Communications Plan (2022b) and an explicit Communications Strategy (2022a), still faces communication challenges:

> So things like public events, things like talks that may be open to the public, it's very hard to find them and you really have to know where to look. So that's a big obstacle that we're working to overcome, but there's been a lot of changes in our university central communications (MCM3).

> Our website is really terrible… the university's website. Our personal website is good. So when you go on it, it has three pages, you'll open it, and at the top it will say for students, for faculty and for staff. So, there's nothing for the public (MCM3).

## External Engagement Concerns

As the AFU Principles are very specific to higher education, the Ten Principles were regarded as complementary to the age-friendly activities in the City of Hamilton. Interestingly, their report did not reference the AFU (Age-Friendly Hamilton, 2022)

> There was a concern that the AFU did not conflate with the work of Age-Friendly Hamilton(McM1).

## Accessibility

Despite policies to ensure accessibility and a comprehensive range of services related to accessibility, operational issues such as enrolment and parking remain barriers to engagement.

> You can enrol as what's called a "listener" to join courses with where you join them, but you don't get marked and you just kind of sit and listen as the name suggests but it's…it's very hard to get enrolled. So just before the pandemic we had met with the register's office to kind of hopefully reduce some of those barriers because the previous system was so ridiculous. You had to apply to the registrar and then your form got sent to the financial office. And then from there it got sent to the department. And then from there it got sent back to the financial office and back to the registrar. We have also had some issues about the term "listener"– it can be an enablest term. But then it was used in so many places that it wasn't something we could change easily (McM3)

Parking is a huge barrier and is expensive…but our facility service is looking to find solutions to that, such as, uh, using their golf carts that they have to drive older adults around campus. When we have events and they're looking at designing a program where students would volunteer to do this or be paid to do this, to kind of continue to provide that intergenerational element (McM3).

**Continuity**

The Office of the Provost developed a comprehensive Continuity Plan (2021), but it primarily addresses COVID-related actions and reiterates their commitment to upholding the vision and mission of McMaster; it does not address staff or policy continuity:

the people you might have started off with when you became an age-friendly university have moved on and graduated and, and then you begin again (McM1).

Although COVID presented a different set of unique challenges to McMaster (Raina, 2020) they have rallied and are back on track with their plans. Despite the challenges, they continue to embrace the many opportunities to expand, elaborate existing programmes and implement changes with a greater focus on fulfilling the Ten Principles.

**Ten Principles in Review 2022**

McMaster's institutional approach to becoming a member of the AFUGN recognised four key focus areas: accessibility, inclusion, programming, and engagement, which they have continued to develop. While they had a well-developed focus on ageing, joining the AFUGN provided an opportunity to forensically examine and scope their existing activities and identify new opportunities to expand into areas to bring added value to Hamilton's staff, students, and the broader ageing community. The Ten Principles of an AFU continue to be broadly embraced and implemented campus-wide. They have embraced a fluid approach towards the Ten Principles and continue to meet and review them regularly (Ward, 2021, 2022) and document activities in their annual report and website (https://mira.mcmaster.ca/, 2022).

### 5.5.3 Case Study 2: Masaryk University (MUNI)

**Background**

Masaryk University (MUNI) was founded in Brno, the second-largest city in the Czech Republic, in 1919. It has just under 30,000 students (49% undergraduate, 53% postgraduate, and over 7000 international students). It is regarded as a highly prestigious institute of higher education that caters to diverse students' educational and learning needs. It ranked #551-560 in QS World University Rankings 2021, with a top score of 85 in international research. With ten Faculties and over 200 departments, institutes, and clinics, it is one of Europe's fastest-growing higher education institutions. MUNI's top priority is scientific research. In addition to attaining a leading position in research grant competitions, MUNI has made considerable financial investments to enhance research and teaching capacity, facilitate the development of tools for transferring knowledge, and improve support for research and innovation. MUNI firmly believes that every individual has the fundamental right to education, regardless of age or social status, and prides itself on providing diverse courses and programs to support and assist students in fulfilling their academic ambitions (Accelerator, 2023).

In 2020, MUNI was preparing a strategic project related to the university's development and structured investment. They became interested in the Ten Principles of an AFU as it coalesced their work in ageing research and, more broadly, on promoting healthy communities. However, the COVID-19 pandemic halted their plans, and as the pandemic subsided, the Czech government committed to financially supporting a post-COVID-19 national recovery plan. At MUNI, these plans include building a new hub to host a range of interdisciplinary institutes focusing on health and ageing.

> It just coincided at the right moment because the strategic project is more related to the development of the university and more structured investments (MU1).

MUNI joined the AFUGN in 2021 during the COVID-19 pandemic with a modest plan to address specific Principles. They planned to use the Ten Principles as a starting point to produce a comprehensive analysis of age-related activities throughout MUNI, identify gaps, and inform an operational plan. The Ten Principles are less developed at MUNI as they reflect their shorter membership time, coinciding with the COVID-19 pandemic (Vidovićová, 2021).

The AFU activities throughout MUNI are jointly coordinated by the Lifelong Learning Department and the Centre for the Study of Ageing (CERA), a Working Group newly established at the Department of Sociology at the Faculty of Social Studies. MUNI's commitment to ageing led it to finalise plans to join the AFUGN in 2021 and create opportunities for older people to participate in research and educational programs (President Bares, 2021). By joining the AFUGN, MUNI expressed its support and efforts for the Ten Principles on different levels of its structure. A senior staff member (MU1) primarily drove the AFU activities and participated in the interview. While COVID limited and impacted their overall activities, MUNI has ambitions to implement more of the Principles as resources become available and the university returns to its pre-COVID activities. More details about their work are outlined below (Appendix X).

**The Centre for Research on Ageing (CERA)**

CERA is a Working Group in the Faculty of Social Studies (FSS), Department of Sociology. It is involved in researching a broad spectrum of issues relating to ageing from a sociological perspective. Research areas include the sociology of ageing, active ageing, age discrimination, and age mainstreaming. Over the years, it has participated in many research projects to help older people lead better lives. CERA's research interests include social exclusion, environmental issues, social and pension policies, and lifelong learning. Research studies include robust qualitative and quantitative research elements to contribute to and inform policy (Faculty of Social Studies Masaryk University University, 2021).

**University of the Third Age (U3A)**

U3A enhances the lives of older people by promoting an active lifestyle, physical and psychological well-being, and independence post-retirement. Their programs cater specifically to older adults, providing a comprehensive learning experience through lectures, seminars, practical training, and field trips. U3A's main objective is to facilitate participation in MUNI activities tailored to meet the educational needs of older adults, promoting active engagement and mutual learning (Skilton-Sylvester, 2000).

MUNI's University of the Third Age[7] (U3A) is well-established in the university. The U3A is a vital part of MUNI and was instrumental in MUNI becoming an AFU. U3A was established in Masaryk in 1990, and since then, it has had an instrumental role in shaping the social, educational, and cultural activities carried out in the university (Masaryk University, 2021a). The main activities of the U3A have complemented several successful teaching and research programmes that address ageing issues and actively involve older people. One specific research project, "Health and Ageing Society in the Environment of 4.0 Technologies," was instrumental in informing their approach to the Ten Principles and is included in their Strategic Plan (2021).

**Factors informing the decision to join the Age-Friendly University**

An internal discussion document (Vidovićová, 2021) shows that MUNI's primary rationale for joining the network was to develop broader international engagement opportunities to contribute to their international research profile. Also, the concept of lifelong learning embedded in MUNI for over 20 years allowed older people to expand their engagement with higher education, but MUNI also identified several other factors that influenced their decision to join the AFUGN. Other considered factors suggested that these are also relevant pathways (Vidovićová, 2021):

- To support the public image of MUNI as an inclusive employer and educator.
- Increase the international visibility of MUNI's engagement in ageing issues.
- Support processes such as the HR Award applications.
- Support an emphasis on research and teaching of disciplines related to ageing in a strategic context of the MUNI project.
- Competitive advantage in grant applications (e.g., in sections requesting information on the applicant's workplace).

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[7] U3A was started in France at the Faculty of Social Sciences in Toulouse in 1973 by Professor Pierre Vellas. The U3A is an international movement whose aims are the education and stimulation of mainly retired members of the community—those in their third 'age' of life. There is no universally accepted model for the U3A. Its original conception in France as an extramural university activity was significantly modified and interpreted. It was recognised that most people of retirement age have something to contribute, and the emphasis has been on sharing without formal educational links. In continental Europe, many universities host U3A. The Third Age Network (TAN) is very active in Canada; however, currently only within the province of Ontario, where its mandate is to provide educational programs for older adults that are responsive to their unique psychological and physiological characteristics (Trove, 2023).

- Contribute to developing an age-friendly environment in the community and cooperation with the municipality and national policy more broadly.
- Engage with the WHO Healthy Cities Programme and similar international partners.
- Help to prepare and strengthen the institution's readiness for an increased national ageing population and its effects on the functioning of MUNI.

Similarly to MIRA at McMaster, the discussion on joining the AFUGN originated from the Centre for Research on Ageing (CERA) and the University of the Third Age (U3A).

**The Process of joining the AFU**

An activities review carried out in the university was coordinated by a diverse stakeholder group, including the Office for Development, CERA, the Department of Sociology's Working Group and U3A and outlined in a discussion document listing the potential opportunities for the university to endorse the Ten Principles (Vidovićová, 2021). Their proposal was initially presented to Faculty Management.

> The deciding moment to go ahead with the plan to investigate…it came after an approach by (…..) to the Management Team. We discussed the pros and cons, and (they asked) if this was a HR policy. I said, no, this is not a HR policy; it is much broader and bigger than that. And they said ok, it's really in line with the strategic plan…Then, I was invited to give a presentation to senior management after they had pre-discussed it. There were lots of questions, like why this network is better than any other networks, and there was a concern about why we should choose this one, then they wanted to know what other universities are involved. When I checked the list of universities already in the network with their universities, they decided yes – there is potential for cooperation. Of course, there were also overlaps (other advantages). They said, fine, we will go with it. They wanted to be sure this is something really to go forward with, and they approved it right there on the spot (MU1).

From the outset, the concept of the Ten Principles at MUNI was positively received there:

> …the President of the university was very open to the concept (MU1).

> It can be something to do with the fact that our president is a medical doctor, but we are happy that we have support even in the social sciences for that (MU1).

A formal letter outlining their commitment to the Ten Principles was submitted to DCU (Bares, 2021), and the letter acknowledged the need to recognise the heterogeneity and diversity in all the stakeholders served by MUNI. It also referred to its many programs and

tools to support intergenerational cooperation and age-friendly practices in teaching and research. Becoming a member of the AFUGN provided an opportunity to be inspired and to develop further and coordinate activities that will result in becoming an even more age-friendly, age-conscious employer, teaching and research institution and increase the relevance of their work for the wider society (Bares). The letter also referred to the Ten Principles in MUNI's Strategic Plan (2021)

**Overall Approach to Applying and Implementing the Principles**

Interviews revealed that although all Ten Principles were fully endorsed by MUNI, their primary focus is Principles 1, 2, 3, 4, 5 and 8. Principles 6, 7, 9 and 10 are secondary (Vidovićová, 2022).

**Table 5.33.  Principles in Order of Priority at Myserak University**

| Ten Principles of an Age-Friendly University | Myserak University Brono, Czech Republic |
|---|---|
| 1. To encourage the participation of older adults in all the **core activities** of the university, including educational and research programmes. | Priority |
| 2. To promote personal and career development in the second half of life and to support those who wish to pursue "**second careers.**" | Priority |
| 3. To recognise the **range of educational needs** of older adults (from those who were early school-leavers through to those who wish to pursue Master's or PhD qualifications). | Priority |
| 4. To promote **intergenerational learning**  to facilitate the reciprocal sharing of expertise between learners of all ages. | Priority |
| 5. To widen access to **online educational opportunities** for older adults to ensure a diversity of routes to participation. | Priority |
| 6. To ensure that the university's **research agenda** is informed by the needs of an ageing society and to promote public discourse on how higher education can better respond to the varied interests and needs of older adults. | Secondary |

| | | |
|---|---|---|
| 7. To increase the understanding of students of the **longevity dividend** and the increasing complexity and richness that ageing brings to our society. | Secondary |
| 8. To enhance access for older adults to the university's range of **health and wellness** programmes and its **arts** and **cultural activities**. | Priority |
| 9. To engage actively with the university's **retired community.** | Secondary |
| 10. To ensure regular **dialogue** with organisations representing the interests of the ageing population. | Secondary |

The Principles are expressed in activities across the university, although the level of fulfilment may differ between centres and individual faculties. MUNI adopted this approach to promote intersectoral and interdisciplinary cooperation and create value for the older people living in Brno and South Moravian.

> I believe we have the potential to implement all of them and grow in all of them, but also we need to see more about what's going on. So, we are starting to further map the courses and we can see that there's quite a lot of courses that somehow are involved in this, like making the longevity dividend. Like the seventh Principle, when I look at it. I have a lot of work done in the sixth Principle in the research agenda; for example, we are also quite well involved in the 10th Principle because we really are working. That's what also quite intrigues me, all the different, non-educational parts of the university: the agricultural centre or many others, or the housing part of it and all the staff (MU1).

**Activities at Myserak**
**CERA**

MUNI has pioneered several inspirational practices towards implementing the Ten Principles of an AFU through CERA. Their contributions are highlighted below.

MUNI embraces age-heterogeneous education to cater to diverse student needs in higher education. The Pedagogical Competence Development Centre (CERPEC) plays a proactive role in ensuring educational opportunities are not limited by age. Teaching workshops, a part of CERPEC programs, focus on developmental psychology, generational differences, and teaching methods for age-heterogeneous classes. This inclusive approach considers all students' cognitive, social, and emotional development. Courses are designed explicitly to

address the needs of an age-diverse audience, ensuring a holistic learning experience in an inclusive environment (Vidovićová, 2018).

The learning environment at Masaryk promotes opportunities for older people to meet and share knowledge, form friendships, and contribute to research. Emphasis is focused on the social, cognitive, and emotional development aspects of individuals from different age groups to promote intergenerational engagement and inform teaching pedagogies. The age-heterogeneous education model ensures that students can benefit from practical and functional teaching practices, which are offered as part of a series of workshops for staff and students (Výuka Zohledňující Věkovou Rozdílnost Studentů. Masaryk University, 2021). Before designing the teaching and learning model, the university investigated the distinctive learning needs of older adults, for example, their level of education. After evaluating the learners' needs, a policy of campus-wide intergenerational learning was adopted to foster reciprocal sharing of knowledge and expertise between learners of different ages.

**Genetic Conference (GSGM) 2022**

MUNI showcased cutting-edge genetics and molecular biology research through an event featuring presentations by top experts from academic institutions. Alongside traditional poster sessions and concise lectures, the university engages older individuals in conferences and workshops to inform their research. These events disseminate findings and serve as platforms for young students and scientists, inspiring them to contribute to research promoting healthy ageing (Masarykova Masaryk University, 2020).

The Research Department hosts Seminar Series, including Mendel Lectures, open to scientists, staff, and students (including U3A). These seminars featuring renowned scientific figures, including Nobel laureates, cover specific interdisciplinary topics, excluding those not of broader societal interest (Pavlikova, 2020).

**Prioritising the health needs of older people during Covid 19**

MUNI participated in the COVID-19 vaccination drive by partnering and cooperating with regional coordinators and vaccination centres. The university arranged vaccinations for current and former employees, senior academics, and professors emeriti to safeguard them against the infectious virus (Masaryk, 2021a). The fundamental objective of the proactive

vaccination drive by MUNI was to ensure that face-to-face teaching could resume and to minimise the impact on all learners. It also ensured that the retired academic community could avail of these benefits, recognising that their health needs were also a priority.

**Emphasis on age management**

The Department of Educational Sciences at the Faculty of Arts initiated the Strategy of Age Management project at MUNI, recognizing faculty members as valuable university assets (Lazarová, 2011). The project aimed to map the position of older academics and individuals in the Czech Republic and Finland labour market and deliver a program focusing on second careers. MUNI engaged in dialogue with various organisations to promote and empower older people with respect and dignity, regardless of age, aligning with the WHO's definition of age-friendly cities (WHO, 2008). MUNI continues internal collaboration with stakeholders to develop principles related to age management and support their older workforce.

**Provision of voluntary assistance to older adults in the community**

**MU Volunteer Center**

The MU Volunteer Center, founded in 2020, provides diverse voluntary assistance to older adults, including support adapting to new technologies and the internet. Through its volunteering program, older adults receive guidance on utilising online resources, fostering intergenerational exchange between older individuals and students (Orsillo, 2022).

**Creating value through interdisciplinary cooperation**

MUNI conducts diverse scientific projects and research to deepen understanding of ageing across disciplines. University leaders emphasize the importance of traditional student cohorts comprehending the socio-health issues and economic challenges faced by older adults, fostering interdisciplinary collaboration among professionals. It aligns with Kalache's[8] perspective on ageing, which was discussed previously. Experts at the university

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[8] "All professionals must be prepared for the fact that a huge percentage of their patients, clients and customers will be older adults. This provides a unique role for universities to have an impact" (Kalache, 2018).

work on integrating information technology into healthcare to enhance accessibility for older adults. A multidisciplinary approach drives the development of integrated healthcare, aiming to improve the quality of life for older adults. CERA is crucial in promoting interdisciplinary research on ageing-related topics such as environment, ageism, active ageing, and technology. Successful projects include robotics initiatives utilizing humanoid robots to promote active ageing among older adults (Masaryk University, 2023).

**Activities offered by U3A at Myserak**

U3A offers a range of opportunities at Myserak, including online lectures, thematic semester-long courses, customised exercise videos, a wellness website, conferences, seminars, and accredited programmes of study. Language courses and co-created course design are also features of the U3A programme aimed at older people. These are outlined in greater detail in Appendix XI.

**Challenges**

**A lack of understanding of the breadth of the age-friendly concept**

MUNI's AFU Champion faced similar challenges to those of McMaster, with the additional challenge of colleagues struggling to understand age-friendly concepts in the context of the hegemony of the English language, which may lead to misinterpretations of some key age-friendly concepts.

A challenging aspect of the AFU is the lack of clarity around language, highlighting the essential role of linguistic and cultural diversity in translation and localisation, particularly for translating Age-Friendly initiatives. This challenge underscores the need to help others understand how these concepts fit into the broader context of the work at MUNI. Effective translation and localisation go beyond simple language conversion; they require a deep cultural understanding to ensure that content resonates with the diverse university community and involves everyone appropriately.

> It can be a challenge; others working outside the field have a perception, and you always have to explain, just like the situation with the IT department. Then you

think, there is no correct translation for age-friendly – even in neighbouring countries, they have different ideas of what it's about (MU1)

What is the vision? The proper use of money, the rationale for this? (MU1).

Health has…become the main topic, but ageing is repeatedly called on as important to look into. But the truth is, at least in the official documents, – what is usually there is understood in the medical context of understanding ageing (medical gerontology) (MU1).

This is not an HR policy is much broader and bigger than that (MU1).

We noted that (especially) at the Faculty of Law, Faculty of Medicine and Pedagogical Faculty, they have quite nice programs for second careers or enhancement of the careers, but it may not be, for example, at our faculty. We don't have these programs. When I debated these issues with the Dean, he said, "that's a very different approach to learning", and our teachers and our academic staff are not really ready to do that (MU1).

It can be a challenge; others working outside the field have a perception, and you always have to explain, just like the situation with the IT department,

## Resources

Other challenges at MUNI focused on time allocation, changing institutional practice, and supporting the AFU Champion in advancing the Ten Principles. The AFU Champion already had an allocated role at MUNI, and the Ten Principles were an addendum to a workload also compromised by the challenges of the pandemic.

It can be a challenge, of course, where there's a limitation of time and energy for everybody for these things – especially as we were right in the middle of a pandemic (MU1).

We are coming into the phase where we should be finishing (a forensic audit of activities) sometime soon and have evidence of what's happening all around. But of course, working only with students, we could only do three or four faculties. Of course, we are the biggest employer in the city as well. It's an enormous structure, not only the faculties but also different disciplines (MU1).

We need to look into changing the ICT system that provides the information for the whole university so that people would be able to look at the age structure of their employees easily - not needing to count it by hand. There was nothing on the age of the students available. So this will change as a direct request of (..). Then it's partially, still pretty much dependent on me and only my job, which I see as the

> biggest weakness. So people would be very happy to help and support me, but there are no other leaders and this is something I kind of miss (MU1).

> So we had this meeting, and it was a great meeting, an online one with the group, I was there present, a colleague was there really silent - just being there and passive in a way. So it would be my wish, to have more active engagement but this will change over time as staff members learn more about it and how to be involved ? There will need to be an office to own it. But on the other hand, as I introduced it, I can understand that I am the one that is expected to take care of it (MU1).

Despite the challenges experienced at MUNI, they were balanced out by the opportunities to customise MUNI's approach to the Ten Principles in the context of their university and the cultural approach to ageing in the Czech Republic.


## Opportunities


## Freedom to Interpret and implement the Principles

MUNI identifies three core factors that inform its values – respect, freedom and responsibility, and states that "they have always respected and professed the democratic values of a Free Republic. To this day, these values have formed the basis of its internal culture and are widely shared by the university's academic community" (Masaryk University, 2022). It is exemplified by the comment below:

> The thing is that each faculty is very autonomous. Everybody is allowed to do what they see fit - any department or absolutely any faculty (member). However, departments are also pretty autonomous in what they do; the freedom of research or anything is enormous and a great asset. If the strategic document says ageing and health, it will not constrain or limit us. There is a lot going on in different departments and faculties that would fit under the umbrella of ageing and many of the principles of age-friendly universities. And then they can happen pretty much spontaneously or by driven need or recognised need of the society and then would be welcomed by their overall structure. This is something that we really want to pursue (MU1).


## Support

A Review of the Strategic Plan of the Faculty of Social Studies (2021) reveals one of the strategic goals of the Faculty is a commitment by leadership to supporting interdisciplinary teaching, strengthening the importance of social responsibility and sustainable

development in education and developing an innovative and offer of programs raising important social issues. This commitment is reflected in the comment below:

> So far as I'm seeing, nobody closed the door on me or said, now go somewhere else or come back later. If I come up with something, I'm pretty confident that (as this is supported under (MUNI) leadership), it will be happening (MU1).

## Future Plans

The Strategic Plan (Masaryk, 2021) and internal documents (Vidovićová, 2021) regarding the potential to fulfil the Ten Principles indicated a pathway to engage students, alums, and staff and outlined how the Ten Principles could be incorporated into the existing MUNI framework.

> "Alumni and everybody could be ready for the challenges of the future; for example, ageing should be recognized as one of the challenges, it's not about the age-friendliness as such, but the overall topic of embracing and preparing for an ageing demographic…if there was a competition, people could propose new courses that would be for everybody at the whole university as a common denominator, so that people would engage and advance their literacy in a way…like preparation for ageing (MU1).

> So, there are now even new structures where we can incorporate more of the principles, like how to build in the Ten Principles, because we are starting to work across all the faculties, they would be a good place to have the implementation also, it's related to the teaching and research and soft skills. Working with different age groups is a good place to start (MUI1).

## Ten Principles in Review 2023

Masaryk's commitment to the Ten Principles of an AFU is reflected in the Strategic Plan through its teaching, learning, and research activities. While operating in a contemporary educational domain, Masaryk University engaged and implemented the critical principles of the AFU concepts. The primary pillar of the strategic approach of Masaryk University is the formation of interdisciplinary cooperation among diverse experts and professionals from different areas. Such a cohesive approach has led to exciting and informative research. The dedicated efforts of Masaryk to the ageing sector have positioned it as one of the most inspiring AFUs in Europe, with older people at the forefront of their research activities and educational programs. While one person with an already challenging workload leads MUNI's holistic approach to the Ten Principles, they have made strides in their approach, especially in informing internal change.

## 5.6    Conclusion

This chapter presented the influencing factors and processes of becoming and remaining an AFU. It explored the implementation and approach of AFUGN members globally through data drawn from surveys, qualitative case studies, and documentary analysis. The survey highlighted the factors of becoming an AFU and provided insight into the rationale for joining the AFUGN. A case study of McMaster University, which joined the AFUGN in 2017, reveals that it has a dedicated team responsible for implementing the Ten Principles and developing programmes and curricula to inform and advance them. A case study of Masaryk University, which joined more recently (2021), revealed a journey that is just beginning and the added complication of language interpretation. Documentary analysis complemented and corroborated interview evidence, providing further validation through triangulation.

The impact of the COVID-19 pandemic cannot be discounted on both institutions, challenging them by disrupting "normal operation" and requiring them to pivot to adjust how to meet the needs of their staff, students, and the broader community. However, it also opened new opportunities for university leaders to explore innovative teaching and learning modes, moving beyond the conventional models in developing new forms of inter-university collaborations. The opportunities for university leaders to learn more from the global health crisis resulting from the outbreak of COVID-19 and its impact on older people and demographics provided an opportunity to engage in closer and deeper collaboration for the betterment of society (Mok, 2022). McMaster University and Masaryk University demonstrated an ability to pivot and respond to some of these challenges through the Ten Principles. Both universities recognised the importance of all Ten Principles, and while one may be more active in one area and the other more passive, they have both demonstrated a commitment to the Ten Principles. While there are similarities in the experiences and approaches of both universities, their priorities and cultural aspects differ, but their commitment remains unquestionable. The next chapter will discuss the findings in greater detail.

# Chapter 6: Discussion of Findings

*Nothing has such power to broaden the mind as the ability to investigate systematically and truly all that comes under thy observation in life.* – **Marcus Aurelius (121-180) Roman Emperor and Philosopher.**

## 6.1    Introduction

This Chapter discusses the findings from the previous chapter, analysing them through key themes derived from research on the factors and processes involved in establishing and sustaining an Age-Friendly University (AFU). These findings are contextualised within the existing literature on age-friendly concepts and the supporting evidence for each principle. The identified key themes can be categorised into two groups - the principles of most importance, which are intergenerational learning, promoting the longevity dividend, and including older people in the core activities of the university by fostering age inclusivity on campus, and the factors of most importance, societal need, promoting age inclusivity, and intergenerational engagement. These themes will be discussed collectively within their respective contexts.  Other elements like participant demographics, language and cultural considerations, the built environment, institutional expertise, resources, and the interpretation and application of the Ten Principles (Table1.1) will also be explored.

The themes are discussed in the context of the literature referred to in previous chapters. The analysis is informed by the author's experience as the AFU Network Coordinator for over ten years and over twenty-eight years working in the ageing sector, with a research interest in this area. Demographic change is influential in continuing to shape and inform a new narrative on ageing as people live longer. One of the key conceptual factors brought to the study is confirmation that higher education is uniquely placed and has a distinct role in supporting demographic change through teaching, learning and research. Theories and research on ageing also frame the analysis. This chapter outlines whether this research's objectives were met and discusses the significance of the study findings.

## 6.2    Objectives and Context of the Current Research

The study arose from a desire to understand the influencing factors and process of becoming and remaining an AFU. To achieve these goals, it posed three questions:

- What were the influencing factors for becoming and remaining an AFU?
- What was the process of becoming an AFU?
- How were the Ten Principles of an AFU interpreted and implemented?

The study utilised a mixed methods approach in two stages: first, a survey completed by 45 universities offering an overview of practices, and second, case studies providing in-depth exploration of research questions. The quantitative survey comprised twenty-five questions for AFUGN members. Case studies of one Canadian and one Czech university were conducted through interviews and documentary analysis, providing contextual depth.

The survey questions gathered institutional information, factors influencing AFUGN membership, interpretation of the Ten Principles, and decision-making processes for implementation. The findings underscored the complexity of various conceptualisations of ageing, as discussed by Nilsson (2016), who identified four distinct stages: biological, social, mental, and functional. The breadth of activities offered by AFUGN institutions aligns with these stages, as evidenced in the case studies.

The first objective of the research was achieved as it revealed the factors of most significance as to why a university would embrace the AFU concept (Deboick, 2010; Neave, 2000; Newman, 2008; Trelawny-Cassity, 2021). The second objective, which addressed the process, indicated a universal approach to the various stages recommended by the AFU Coordinator for joining the AFUGN, for example, convening a Working Group and mapping the initiative to the Ten Principles. Respondents reported the need to provide evidence to Senior Management of the membership, which contributed to the credibility of the AFUGN. It also suggests a subtly competitive approach to the process of becoming age-friendly. As universities outlined their rationale for joining in their endorsements, they were keen to ensure they were as comprehensive as others and to laud their success in the sector.

Further analysis of this aspect of joining the AFUGN might indicate a concern about status and that universities need reassurance about the prestige of being an AFUGN member and its advantages to strategic collaboration. The third objective explored the context in which the Ten Principles were interpreted and implemented. Respondents indicated how they built on existing programmes and activities, interpreting the Ten Principles and utilising

them to satisfy institutional, national and global policies (Higher Education Authority, 2018; UN, 1999, 2016).

## 6.3 Profile of the AFUGN Respondents

Survey data indicates that the AFUGN spans Europe, North and South America, Southeast Asia, and Australia, with North America (USA and Canada) holding the highest membership due to its size and population demands. In the context of the impact of AFUs, there is an increasing demand in the US for more ageing-related policies at the national level and for university initiatives that address demographic shifts. These initiatives respond to the needs of an ageing population but also reveal new revenue sources amidst declining numbers of traditional students. By embracing the AFU principles, universities can adapt to these demographic changes and support lifelong learning and inclusivity. It aligns with literature emphasizing the need for US universities to innovate and offer training for prolonged working lives. While older, more established universities have readily embraced the AFU concept, it does not necessarily translate to being more age-friendly. It may stem from their larger student cohorts and adaptability to change. The study echoes concerns from literature about universities needing to swiftly adapt their systems to accommodate new student demographics and alternative learning approaches (Dimmock & Walker, 2000; Foster & Walker, 2013; PA Consulting, 2020; James, 2022).

## 6.4 Overall Key Findings

The research provided insight into three elements; the first was the factors of most importance in the decision to join and remain a member of the AFUGN. The second was the associated Principles and how they were implemented in the institution. It is of note that the factors outlined here align with the Age-Friendly Principles. As an aide memoire of the findings in Chapter 5, the table below illustrates the factors and Principles in ranked order, showing the factors of importance in contrast to the Principles of importance. The third element focused on the process of joining the network.

The influencing factors for joining the AFUGN in order of importance contrast with the Principles of importance. The survey was carried out at a specific time, and the reasons for joining reflect the university's outlook at the point of joining the network. However, by the time universities completed the survey, it was evident that, in many cases, there was a shift

in the relationship as to which principles were more important. Even later in the survey, the Principles of the order of importance were not the Principles most actively implemented at the institution.

**Table 6.1. Influencing factors of most importance for joining and remaining an AFU and Principles in Order of Rank**

| Factors for Joining AFUN in Order of Importance (survey) | Principles in Order of Importance (survey) |
|---|---|
| 1. Intergenerational Engagement (80%)<br>2. Promoting Age Inclusivity on Campus (75.6%)<br>3. Societal Need (66.7%)<br>4. Institutional Mission/Vision (64.4%)<br>5. Public Profile (55.6%)<br>6. Research Opportunities (42.2%)<br>7. Civic Engagement (37.8%)<br>8. Collaborative Research on Ageing & Institutional Ageing Expertise /Age-Friendly Cities Programme (33.3%)<br>9. National Policy & Sustainable Development Goals (17.8%)<br>10. Corporate Social Responsibility (13.3%) | 1.To encourage the participation of older adults in all the **core activities** of the university, including educational and research programmes. (Principle 1: 35.6%) |
| | 2. To promote intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages. (Principle 4:20%) |
| | 3. To ensure the university's research agenda is informed by the needs of an ageing society and to promote public discourse on how higher education can better respond to the varied interests and needs of older adults. (Principle 6: 11%) |
| | 4. To promote personal and career development in the second half of life and to support those who wish to pursue second careers. (Principle 2: 6.7%) |
| | 5. To increase students' understanding of the longevity dividend and the increasing richness that ageing brings to our society. (Principle 5: 4.4%) |
| | 6. To increase students' understanding of the longevity dividend and the increasing richness that ageing brings to our society. (Principle 7: 4.4%) |
| | 7. To engage actively with the university's retired community. (Principle 9: 2.2%) |

| Factors for Joining AFUN in Order of Importance (survey) | Principles in Order of Importance (survey) |
|---|---|
|  | .8. To ensure regular dialogue with organisations representing the needs of the ageing population. (Principle 10: 2.2%) |
|  | 9. To widen access to online educational opportunities for older adults and ensure a diversity of routes to participation. (Principles 3: Not ranked) |
|  | 10. To enhance access for older adults to the university's range of health and wellness programmes and its arts and cultural activities. (Principle 8: Not ranked) |

## 6.5 The influencing factors and principles of most importance for becoming and remaining an Age-Friendly University

There are three sections to the discussion: the deciding factors of most importance in order of relevance as indicated from the survey, the secondary factors of importance, and finally, the factors of least importance. As these overlap, they are collectively discussed below.

The findings revealed that the deciding factors for becoming an AFU were **meeting a societal need**, promoting **age inclusivity** on campus, thus contributing to the **equality, diversity and inclusion** agenda, **intergenerational engagement**, fulfilling the **institutional mission and vision**, and improving the institution's **public profile**. These factors concur with those mentioned in the responses of interview respondents, who also mentioned that they provided a mechanism for the institution to inform direct visible action in these areas through their implementation and execution.

These factors were the most important in the context of the Principles when compared in different ways, for example, regarding their institutional importance, the extent to which they were implemented, and who was responsible for implementation. The factors are aligned with the Principles, showing they are interdependent and not exclusive.

### 6.5.1  *Societal Benefit*

Societal benefit as a factor relates to the broader question of the role of higher education in society, and respondents highlighted it as one of the key elements of consideration for becoming an AFU. It is aligned with all Ten Principles and is relevant to network members' institutional mission and vision.

McMaster embraced the AFU concept as it aligned with their vision: *Impact, Ambition and Transformation through Excellence, Inclusion and Community: Advancing Human and Societal Health and Well-being* (McMaster University, 2023). They also expressed a need to educate their university community about the issues of an ageing population to raise awareness and contribute to the narrative on ageing. Case studies and literature support evidence that this is essential to consider when joining the AFU, as both institutions actively sought ways to interpret and implement the Principles in a way relevant to their institutional needs. McMaster and Masaryk have a student-focused mission, and the age-friendly concept is about societal change and benefits for all. How McMaster interpreted and implemented it elevated it to another level and into an area with the potential to make a significant impact.

The development and rationale of the Age-Friendly Cities Programme (AFCP; WHO, 2008) are to improve access to key services, enable people to do what they value and impact their quality of life as they age. It aligns with McMaster's aim to promote ageing, enabling people to stay active and connected and contribute to their community's economic, social, and cultural life. McMaster embraced the AFU concept and adopted a practical application of the AFCP through their walkability survey and focus groups to improve campus accessibility. McMaster delivers a comprehensive educational programme under MIRA to realise its broader ambition to educate and embed the Ten Principles across the entire university (Raina, 2020).

Deboick (2010) challenges the concept that a university is solely temporal by challenging the notion that a university's influence is limited to the time a student spends there. Instead, she argues that university experiences have a profound and enduring impact on an individual's thought processes and behaviours throughout their life. This perspective underscores the long-term significance of higher education, suggesting that the lessons learned and the intellectual growth achieved during university years continue to shape personal and professional actions far beyond graduation. McMaster embraces this concept,

as demonstrated by the fact that the university teaches students how to find meaning and purpose in life and demonstrates this through their activities across the campus. As universities are facing challenges dealing with student's mental health issues, there is the realisation that attending university is more than just about getting a degree. It contextualises life purpose, positivity, well-being, and happiness. These have been placed at the epicentre of student education and teaching (Lukins, 2023) and are reflected in the activities outlined in the case study.

Similarly, Masaryk University's strategic plan articulates the need to respond to future challenges such as ageing ( Masaryk University, 2021). While universities have had to adapt and change how they operate and meet the needs of government, industry, students, and other intellectual pursuits, there is a consensus that they have a significant role to play in shaping society (Biesta, 2007; Carey, 2022; Boyer, 1996; Peirce, 1966). While there is a challenge in facing society's expectations of higher education, an institution's social role is growing in diversity and complexity. Ageing is an essential factor not just from a teaching, learning, and research perspective but because of the implications for the students who will benefit not only from an advanced education when it comes to income, career advancement, skill development, and employment opportunities but also because society and community receive benefits of education. Literature supports the positive connection between educational attainment and successful ageing. It shows that societies with higher education rates tend to be healthier and have higher rates of economic stability, lower crime, more unity and trust, and greater empowerment and equality (Global Education Monitoring Report Team, 2015; UNESCO Institute for Lifelong Learning, 2020). This is reflected in the narrative responses from the survey respondents, who reiterated the importance of their work as a vehicle for influencing society.

The many career iterations of young people in the future also reflect the need for higher education to examine the benefits of engaging with the Ten Principles. As society reaps the benefit of longevity, we are also responsible for ensuring we reap long-term benefits such as contributing to societal progress and resilience. Globally, governments are concerned with climate and energy challenges, security and conflict resolution, shifting political systems and the fourth industrial revolution, which calls for solutions to problems that have yet to manifest themselves (Kalache, 2019). Longevity has its benefits and challenges, and the need to be prepared places universities in a unique position to influence how societies are prepared for future ageing populations.

Both universities explicitly expressed this factor, and evidence is reflected in their activities, strategies, and policies to demonstrate the recognition of a university's role in shaping society through their students, teaching, and learning.

### *6.5.2 Institutional Mission, Vision and Public Profile*

The core values of a university are reflected in its mission statements (Aktas, 2021). Every university has its mission; the strategic direction of a university directly relates to its mission statement and a platform to present its core values, such as service-oriented (towards students) or social-oriented (towards society and stakeholders; Breznik & Law, 2019). These three interdependent areas, mission, vision, and public profile, are equally important and connected to the societal benefit of joining the AFUGN, engaging with age-friendly concepts more broadly, and the rationale for implementing the Ten Principles.

The mission statement is a tool to facilitate a university's performance to meet goals set out in the strategic plan. It reflects how an organisation views itself and disseminates its values externally. Masaryk University's and McMaster University's mission statements, as examples of AFUGN members, strongly emphasise active citizenship and view the Ten Principles as a way of realising the university's institutional mission.

**Table 6.2. Mission Statements of McMaster and Masaryk University**

| | |
|---|---|
| We inspire critical thinking, personal growth, and a passion for lifelong learning. We serve the social, cultural, and economic needs *of our community and our society* (McMaster University, Office of Student Affairs, 2023) | To contribute through its scientific activities, student education and social activities to the high quality and healthy life of all generations and a free, cohesive and secure society (Masaryk University, 2022) |

Their mission statements combine content and network analysis for specific disciplines, and future work outlined in the strategic plan puts it into action. Embracing and implementing the Ten Principles by linking them to the mission confirms the institution's vision towards realising elements of its strategic plan, such as research, social responsibility, or internationalisation.

### 6.5.3   *Inclusivity and Equality, Diversity and Inclusion*

Equality, diversity, and inclusion (EDI) were factors interpreted to promote age inclusivity on campus and are linked to Principle 1. Diversity at a university includes staff and students (Montepare & Brown, 2022). Age is an important element for universities that is often overlooked as a diversity factor; fewer strategies exist to increase age inclusion (Morrow-Howell et al., 2020). Interview responses concurred with this view and referred to the challenge of getting the balance right to ensure all elements of EDI are equally served (disability, gender, sexual and religious preference, ethnicity, and age). EDI, in relation to age, encompasses the recognition, acceptance, and inclusion of all individuals across various ages, promoting an environment where all can contribute, participate and thrive in their educational pursuits and professional roles (Montepare & Brown, 2022). Interviewees interestingly reported that the perspective of intersectionality was overlooked at an institutional level when the term "age-friendly" was used. Still, it was more broadly embraced by senior management when it was referred to as age-inclusive.

Respondents noted members' adoption of the Ten Principles to foster broad opportunities for promoting Equity, Diversity, and Inclusion (EDI). The recognition and importance of embracing diversity and inclusion have become significant for nearly all organizations (Raina, 2020). Research indicates that intersectionality literature has given limited attention to ageing or the life course, and gerontology has seldom incorporated insights from intersectionality into research on inequality. Instead, it primarily examines how intersectionality can inform research on discrimination, categorization, and individual heterogeneity. This applies to various forms of discrimination, including sex, race, or disability discrimination. Respondents mentioned that while their institution prioritized EDI activities, there was often an unequal focus, such as on sexual orientation, gender, or disability, neglecting age discrimination as a crucial intersectional issue. Viewing discrimination through a single attribute lens impedes effective responses (Advance Higher Education, 2020).

Highly mobile talent tends to avoid institutions perceived as lacking diversity or not prioritizing Equity, Diversity, and Inclusion (EDI) efforts (Sperlinger et al., 2018). Respondents noted that as their institutions compete for global talent and establish partnerships abroad, their student and staff populations are becoming more diverse regarding race, nationality, and cultural backgrounds. This aligns with research indicating

that while universities adopt business models, they still uphold democratic structures of representation and inclusion (Sperlinger et al., 2018). However, certain minority groups often face under-representation or career progression barriers in higher education employment, limiting the institution's ability to leverage the skills and expertise of all staff. Embracing diverse participants could transform the university's identity and facilitate continuous adaptation to accommodate new staff, students, and learning methods.

An important consideration for informing Equity, Diversity, and Inclusion (EDI) policy is examining how gender roles evolve with age, such as older women assuming household leadership and older men taking on caregiving roles for grandchildren (Vidovićová, 2022). Respondents noted that a majority of program participants are female, highlighting the need for sex- and age-segregated data to develop gender-responsive policies effectively. Gender-based discrimination can compound over time and be exacerbated by ageing, with older women facing dual discrimination based on age and gender both in and out of the workplace (Bourke, 2023). Similarly, older men may encounter challenges to their masculinity, leading to feelings of isolation. Research from the CERA Working Group at Masaryk University reflects interest in this and related areas, such as age mainstreaming and sociological discrimination (Faculty of Social Studies, Masaryk University, 2021).

In the case study, respondents reported an underrepresentation of male participants at the university. Effective engagement targeting men entails a comprehensive understanding of the barriers to engagement. Whether these barriers are social stigmas, a lack of male visibility within a programme, or practical issues such as timing and venue, the project or service must be flexible enough to address these barriers and tailor provisions accordingly (Johal et al., 2012). The efforts of Masaryk University reflect this approach in delivering their programmes through CERPEC, which is active in ensuring learners are not affected by age-related restrictions. One initiative targeted older people to engage with science (O'Kelly, 2022). There is potential for further research to understand more broadly why and how gender impacts engagement in education. Also, understanding changing gender identities and power dynamics in the life course is essential to understanding the ageing experience and how it affects making policy (Stovell & Warth, 2021), which impacts work in other areas of an institution engaged in informing policy or making recommendations to the government.

Many universities practice casualisation of staff, which leaves both older and younger staff vulnerable to unemployment and exclusion from leadership or career development (Theodorakopoulos & Budhwar, 2015). Institutions viewed as accommodating EDI are more likely to attract and retain a broad base of students and staff (Smith, 2024). Institutional mission and value statements incorporate a commitment to EDI and focus on linked concepts such as internationalisation or social and civic duties. The respondents to the case study from McMaster University commented on this aspect of the changing approach at their institution by the EDI team to engage more with staff and students to embrace EDI and engage with the mission (Raina, 2020). The mission and value statements are only effective when translated into action, and the governing body's role in overseeing an institution's direction and performance should ensure that the institution delivers on EDI commitments and objectives. The Ten Principles offer a mechanism to deliver on this. Institutions need to support all stakeholders, whether they have or are from different religions, cultural backgrounds, or social settings, and this also ties in with Principle 3 – recognising the range of education needs of older adults.

## 6.6    Intergenerational Learning

Another primary factor and context for interpreting the Ten Principles are realising and informing intergenerational learning (Blieszner & Artale, 2001; Corrigan, 2011; Hertha et al., 2014; Martins et al., 2019) and the overall health and well-being of older people in social settings relevant to gerontology (Cohen, 2006; Fisher & Specht, 1999; Flood & Phillips, 2007; Noice et al., 2014). Intergenerational learning is a widely understood term in higher education (Blieszner & Artale, 2001; Dantzer et al., 2014; Hertha et al., 2014; Martins et al., 2019) and is reflected in the approach and broad range of activities reported in the data. Intergenerational learning is linked to Principle 4, has many elements in common with the other principles of importance (Principle 7), and is addressed in other segments of this chapter.

Documents analysed in the case studies (Institute for Research on Ageing, 2021; Masaryk University, 2021a) showed that the breadth and scope of intergenerational learning opportunities provided a mechanism to create fertile opportunities to contribute to greater intergenerational solidarity and mutual peer mentoring. These experiences help challenge ageist stereotypes and enhance age diversity (Dantzer et al., 2014) and integration on campus. Masaryk University demonstrates this through various programmes, including

facilitating the U3A and establishing a Volunteer Centre (staffed by students) offering assistance to older adults to develop and enhance digital skills. MIRA at McMaster's Programme "Meet My Hamilton" facilitates the development of new friendships between generations (McMaster University, 2022; O'Kelly, 2022).

Another potential factor for the popularity of implementing Principle 4 is the universal understanding and benefits of intergenerational engagement (Boström, 2014; Dantzer et al., 2014; Hertha et al., 2014; Martins et al., 2019; Schuller & Watson, 2009) which can occur in many forms. Intergenerational engagement may be more attractive to universities to implement as it is broadly applicable, and there is a universal understanding of the benefits of engaging in intergenerational learning and other activities which bring generations together. Investing in it has broad implications that benefit all ages (Schuller & Watson, 2009), bridging differences in social class, ethnicity, and other social variables that overlap with the EDI element.

The intergenerational work at McMaster was particularly interesting. They had many traditional educational and research opportunities promoting intergenerational engagement. Still, they extended beyond that to include developing innovative responses to meet the needs of campus visitors who found it expensive and challenging to access the university. Students got involved in volunteering to drive golf buggies around the campus so that older people could get to where they needed to be. It also benefited other cohorts who had difficulty physically accessing the campus. It concurs with Martins et al. (2019), who found intergenerational programmes a source of "social intervention" that engaged young people and increased their motivation to develop a more positive view of ageing. It also contributes to managing an age-diverse workforce and knowledge solving and exchange between generations, elaborated in literature (Brčić and Mihelič, 2015). It is encouraging that universities are exploring ways to promote intergenerational opportunities in this way.

### 6.6.1 *Creativity Exchange as a means of Intergenerational Engagement*

One of the main ways institutions engage in intergenerational practice is to harness the benefit of creativity as a mechanism to foster intergenerational exchange, as exemplified by case study evidence from McMaster University and Masaryk University. Intergenerational Social Programming (McMaster University, 2022) is a component of intergenerational activities offered by MIRA. The program has been designed to allow

older adults and undergraduate learners to have meaningful conversations, establish new relationships, and learn more about one another (M. Gilbrea Centre for Studies in Ageing, 2021). The program is unique since it creates a common platform where students and older community members interact with each other and share their life experiences and interests. Virtual and in-person intergenerational activities are arranged, enabling students to engage with community members 65 years or older. MIRA introduced the program to facilitate and support the development of new friendships between generations. The program adds value for learners by facilitating community engagement, effective communication and intergenerational relationship building. Another initiative at McMaster University involves utilising storytelling to share experiences, forge friendships and contribute to creating long-lasting, meaningful associations. The Niagara Stories Project invites seniors to share stories about their lives on a digital platform. The project also facilitates intergenerational interaction with student volunteers to combat loneliness and isolation (M. Gilbrea Centre for Studies in Ageing, 2021). At Masaryk, a one-year course with an intergenerational exchange on cultural heritage and historical preservation within Moravia, the U3A and the Moravia Museum are popular with learners (Masaryk University, 2021b).

Creative exchange in later life provides an invaluable lifeline to understanding the benefits of societal ageing, and often, the artistic outputs of older people generate powerful metaphors to illuminate the complexities of later life that can transform the fear of ageing into a dividend and challenge the narrative on ageing (O'Neill, 2011). However, one can celebrate ageing and challenge the fear of old age and the assumption of decline through the arts. For example, at 79, 79, and 75, Mick Jagger and his bandmates continued to entertain legions of fans and released a new album, "Hackney Diamonds," in 2023. Other artists such as Sir David Attenborough (97), Dame Judi Dench (88), Strauss (85), Monet (86), Seamus Heaney (74), Iris Appel (102), and Louise Burgeois (89), to name but a few, continued to work in older age and contribute flexibility of thought and new ideas to society. As O'Neill (1828-1829) says, "Art can afford insights into the preservation of our humanity and continuing need for self-expression."

Additionally, the sociological implications of engaging older people in creative exchange as an approach to engaging in higher education also impact enrolment patterns, access policy and curriculum development (Schuller & Watson, 2009) as higher education pivots towards a new cohort of older students by promoting career development opportunities, further education, or online learning. It is reflected in McMaster's and Masaryk's

educational and research approaches, strategic plans, and community engagement missions, thus enriching the associations between institutions and the wider society (McMaster University, 2023; Vidovićová, 2021). Their work illustrated that being an AFU led to significant engagement with a wide range of community and other organisations working for the betterment of older people in their communities.

### 6.6.2   Longevity Dividend

Literature shows that the core activities of a university – teaching, learning, and research are not the only concerns of higher education. Education fosters social capital and brings diverse groups together (Schuller & Watson, 2009). While intergenerational learning benefits the generations, another critical aspect is the opportunity for traditional-age students to have role models to inform their future ageing. It presents them with opportunities to influence changes to policies and practices which will affect them (Sugar, 2021). The consultation on the EU Green Paper on Ageing (EU, 2021) demonstrates this. A consultation process on the Green Paper, which took place in 2021, provided an opportunity for all generations to have a say in the future of ageing in the EU. Although COVID-19 may have led to fewer submissions from young people's groups, students at DCU made a significant contribution.  They engaged with older people and were surprised by the generations' universally shared similarities, values, and ambitions (O'Kelly, 2021). It highlighted the need for more opportunities for lifelong and intergenerational learning and investment in the Silver Economy, which concurred with the findings of the consultation process and has resulted in the development of new strategies and opportunities for all generations.

A secondary factor in promoting the longevity dividend relates to the cost of treating co-morbidities in older age (Scott et al., 2021). The compression of morbidity that improves health is more valuable than further increases in life expectancy, and targeting ageing offers potentially larger economic gains than eradicating individual diseases. Given the rise in life expectancy, if ageing could be slowed down or compressed (shortening the period in which an individual experiences illness or disability towards the end of their life), people would live healthier lives for a longer period and experience a shorter duration of illness and decline before death., it would diminish the occurrence of co-morbidities at an older age and have a significant economic impact on governments and future generations in terms of jobs, health care, pension provision, and social care costs (Fries, 1980). While

traditional students face a longer working life than the current cohort of older people, the literature suggests intergenerational job sharing and mentoring will change the narrative on ageing and that working for longer will become a way of life as populations age (Dimitriadis, 2018; Flynn, 2018).

The benefits of the longevity dividend are also reflected in the contribution of wisdom, experience, and talent that older people make to society (Sugar, 2021). Supporting young people with caregiving can be a mutual experience, increasing the demand for grandparents to provide childminding and younger people to help support older persons with cognitive or physical impairment (Buchanan & Rotkirch, 2018).

## 6.7. Secondary Factors in the decision to become an AFU

Secondary factors of importance identified by the AFUGN members included harnessing the breadth of expertise already at the university, which is crucial as institutions explore ways to coalesce their existing activities in ageing. These included **supporting research collaborations** and **developing ageing expertise** to enhance **civic engagement opportunities**. These are reflected in Principles 6 and 10.

### 6.7.1 Research Collaborations

Teaching, learning, and research are at the core of higher education. Research is significant as it forms part of an institution's mission regarding learning and discovery, which contributes directly to teaching and scholarship. Part of the training and preparation of students derives from the expertise of scholars who pioneer and lead in their field of study and who can ignite and engage students to contextualise, interpret, and improve their depth of knowledge and skills through innovative teaching approaches (Rosowsky, 2022). The broader university benefits from active research in emerging areas like ageing, and as an institution becomes known for its research and expertise in a specific area, it attracts students, faculty, funding, media coverage, and philanthropic investment, as exemplified by the work of Labarge Centre for Mobility in Ageing strengthening the research focus contributes to the institution's status and brand globally (Faculty of Social Studies Masaryk University, 2021; MIRA & Labarge Annual Report by MIRA McMaster - Issue, 2020). Both case studies showed a benefit to implementing the AFU initiative as it strengthens and leverages research grants through a multidisciplinary approach across both campuses,

not just in chronic diseases and those associated with ageing. Advancing research in ageing contributes to advances in society, which contribute to the economy, drive innovation, harness the opportunities of ageing and develop solutions to the challenges of ageing. This finding concurs with survey respondents' data, highlighting the reputational and economic benefit of engaging as an AFU.

### 6.7.2 Developing Institutional Expertise

Even though ageing is frequently viewed through health or medical gerontology, and many members have medical expertise and knowledge, data revealed that this is not a primary factor in joining the AFUGN. Masaryk University recognised the benefit of interdisciplinary experts and collaboration by supporting and promoting cohesion and cooperation from diverse disciplines through CERA (Masaryk University, 2021b). Data shows that individuals with varied research interests drove the concept of becoming an AFU. This research shows that the Principles are recognised as satisfying higher education's fundamental requirement to meet the needs of a changing society and concurs with Lawton and Nahemow's (1973) theory of the ecological ageing model and Boyer's (1996) paper referring to universities need to reaffirm the "scholarship of engagement" in exploring solutions to social, civil, economic, and moral problems. Respondents recognise that the generic nature of the Principles provided a mechanism to address ageing societal needs more broadly, meet the needs of national policy, equality and diversity policy, and afford opportunities to implement transformational experiences. However, despite the work at Masaryk and McMaster, there appears to be a disconnect between understanding the relevance of ageing in a multidisciplinary context and a missed opportunity to develop broader expertise in ageing beyond the traditional gerontological approach.

### 6.7.3 Civic Engagement

Community engagement activities ensure dialogue between university stakeholders to inform and facilitate transparency, action plans, and route maps (van Hoof et al., 2021). In many institutions, though not all, civic engagement is explicitly identified in the institutional mission (Bringle et al., 2009). The many benefits and importance of maintaining dialogue with organisations representing interest groups provide real-world context and contribute to the research agenda (Cargo & Mercer, 2008). The experiences

outlined in the case studies of the breadth of engagement with external stakeholders have revealed a rich and fertile relationship between the institutions and the public. Survey respondents highlighted several benefits of participating in global AFU initiatives. These include gaining access to grassroots opinions and experiences, developing cross-institutional projects with key international partners, and collaborating with the World Health Organization (WHO) to advance age-friendly concepts in higher education. Such participation can positively influence students and policymakers, promoting a more inclusive and supportive environment for ageing populations.

These findings concur with literature (Biesta, 2007; Zgaga, 2009), which addresses the trend in higher education to offer opportunities that include civic engagement components, leading to civic competence-building to balance the disciplinary courses (Zgaga, 2009). Students involved in civic engagement and deliberations, co-curricular and extracurricular activities, such as community volunteering (demonstrated at Masaryk University Volunteer Centre and McMaster University), can be directed and exposed to communities in areas they may find challenging, but which serve to broaden their knowledge base, build empathy, and directly serve university communities (O'Kelly, 2022b; Office of Student Affairs, 2023). By providing opportunities for civic engagement on campus, universities can significantly enhance students' civic agency (Boyte, 2005) and contribute to the broader concept of the university's impact on societal benefit.

## 6.8.    Factors of least Importance

Factors of least importance expressed by AFUGN members included meeting the **Sustainable Development Goals**, the **Age-Friendly Cities Programme**, **corporate social responsibility,** and **humanities and technology**. There was no evidence from the interviews or case studies on these factors, though McMaster conducted a walkability survey of their campus using the suggested WHO methodology (2008). It does not suggest that these factors are insignificant, only that their ranking is not as important as others. Universities expressing interest in joining the AFUGN frequently raise concerns about the costs of implementing age-friendly city approaches on their campuses. However, this perspective overlooks the intrinsic interdependence between these approaches, which broadly intersect with research, societal benefit, and the principles outlined by the Ten Principles.

### 6.8.1 Sustainable Development Goals

The SDGs launched in 2015 recognise that ending poverty and other deprivations must go hand-in-hand to improve health and education, reduce inequality, and spur economic growth while also tackling climate change and working to preserve our oceans and forests (UN, 2016). The WHO affirms that ageing is not a purely biological process; it is influenced by external factors like the built environment, societies and communities, policies, services, and systems (Fries, 1980).

The environments older people live and work in must enable healthy ageing by supporting their autonomy and encouraging greater connectivity, security, and identity. The UN Decade of Healthy Ageing (WHO, 2018) seeks to contribute to the SDGs by empowering strategies such as age-friendly communities. Higher education is critical in helping society achieve the SDGs through leadership and core activities –  teaching and learning, research and institutional operations. Education and research are explicitly recognised in several SDGs, and universities directly address these key focuses, but ageing straddles many of the goals. This observation contrasts with the literature (Duran, 2022; UN, 2018), which reviewed activities by country and made explicit recommendations for higher education to respond to age-related challenges through specific science, technology, and innovation (STI) programs.

Universities may not consider the SDG framework relevant to their work because they associate the term sustainability primarily with environmental actions. Research shows that companies that engage with sustainability are good at doing so in research, strategy, and management but not in manufacturing, operations, etc. As this could be considered low-hanging fruit for this type of engagement, universities should at least bring their expertise and influence to change approaches to manufacturing and operations  (Lozano, 2023). Universities need to do more than lip service regarding the SDGs (Cuesta-Claros et al., 2023), so why is there a gap in linking this to the Ten Principles? The approach to the SDGs (Bromaghim & Kim, 2020) is similar to implementing the Ten Principles, such as developing university partnerships and student-led projects. The links between healthy ageing and sustainability agendas articulate how progress should be monitored. There are also numerous possibilities to define targets better, measure impact, and develop closer partnerships with industry to advance sustainability (Chapman et al., 2020).

The Sustainable Development Goals (SDGs) emphasise reducing inequalities and promoting inclusive societies, which directly intersect with the concept of an age-friendly university. Awareness of inequality and the impact of different societal views significantly shape how age-friendly initiatives are perceived and implemented within universities. The following goals outline the direct action universities can take to inform specific SDGs.

**Table 6.3. The Sustainable Development Goals and Actions of the AFU**

| GOAL | ACTION |
|---|---|
| **Quality Education (SDG 4)** | Recognising the disparities in access to education among different age groups, particularly older people, highlights the need for lifelong learning opportunities. Awareness of these inequalities can lead to more inclusive educational programs that cater to diverse age groups, ensuring that older individuals have equal opportunities to engage in learning. |
| **Decent Work and Economic Growth (SDG 8)** | Understanding the impact of ageism on employment opportunities for older adults can drive universities to develop programs that enhance the employability of older students and faculty members. This includes providing career services tailored to the needs of older individuals and advocating for policies that support continued professional development. |
| **Reduced Inequalities (SDG 10)** | Societal views on ageing often perpetuate stereotypes and biases, leading to ageism. An age-friendly university must actively combat these prejudices by promoting an inclusive environment that values the contributions of all ages. This involves creating supportive policies and fostering a culture of respect and inclusion. |
| **Sustainable Cities and Communities (SDG 11)** | An age-friendly university should also consider the broader community context, addressing the unique challenges older adults face in urban settings. This perspective encourages universities to engage with |

| | local communities to create age-friendly spaces and resources on and off campus. |
|---|---|
| **Partnerships for the Goals (SDG 17)** | Building partnerships with diverse age groups and perspectives can enhance the effectiveness of age-friendly initiatives. Awareness of inequality and societal views can lead to more meaningful collaborations, ensuring that the voices of older adults are included in decision-making processes. |

There is also an intergenerational aspect to sustainability. Young people are growing up in a world where they have witnessed, experienced, and discussed climate change (Jones, 2023). In the past, sustainable development was not discussed, as "make do and mend" was embedded in societal consciousness and formed part of everyday life. Older people did what their parents did: recycled bottles, repaired appliances, etc. (Castelow, 2024). A similar sentiment has recently been reiterated, emphasising the adoption of circular solutions such as reducing, reusing, and recycling materials. According to Deloitte & Touche (2023), implementing these strategies can enable businesses, cities, and nations to reduce material consumption and environmental impacts, including emissions, while maintaining high living standards. A case study participant (MM3) reflected that while the university strived to meet the SDGs, it seemed the university could not identify how the Principles could be fully utilised to affect the goals.

The Elders, a movement of global leaders working for peace, justice, human rights, and a sustainable planet, are actively engaged in the sustainability agenda (The Elders - Independent global leaders: Ethical Leadership, 2024); however, the advance of the sustainability movement led by Gretta Thunburg appears to have identified sustainability as only a concern of young people (Prakoso, Timorria and Murtyantoro, 2021). While young people are prominently represented at global gatherings, there appears to be no formal representative body for older individuals apart from The Elders. However, no similar formal representative body of older people other than the Elderds is visible. While there is a call to action for academia to meet the SDGs by 2030 (Apiday, 2023), there is oversight in considering the Ten Principles in isolation rather than a mechanism which could be used to contribute towards achieving the goals and solving real-world problems (Chapman et al., 2020).

By integrating an awareness of inequality and societal views on ageing into the implementation of the SDGs, universities can develop more comprehensive and effective age-friendly policies and programs. This approach not only addresses the specific needs of older adults but also promotes a more inclusive and equitable academic environment for all

### 6.8.2 Age-Friendly Cities Programme (AFCP)

Central to the development of the AFCP was research that identified how the determinants of active ageing – a city's landscape, buildings, transportation system, and housing – contribute to the mobility, health behaviours, social participation, and self-determination of older people (Plouffe & Kalache, 2010). While the approach to the AFCP is based on universal design principles, it is interesting that AFUGN members did not consider the eight domains (outdoor spaces and buildings, transportation, housing, social participation, respect and social inclusion, civic participation and employment, communication and information, and community and health services) to be of more importance in terms of its application to the campus. The application of the AFCP approach and its benefits is likely overlooked and not immediately evident in the activities of a higher education institution. Additionally, individuals outside the field of gerontology may not be familiar with these principles or may have never considered them applicable to university campuses. Yet every campus engages with these AFCP domains daily as it has students and staff travelling to campus, students living on campus, and being included in social activities. There are employment opportunities, people navigating the public realm buildings, and availing of outdoor space. There is also involvement in civic engagement with the broader community and communicating with staff, students and the community. The age-friendly cities approach could be easily interpreted academically to benefit the university community and complement the Ten Principles (O'Kelly, 2022).

### 6.8.3 Corporate Social Responsibility (CSR)

Literature states that social responsibility is essential to accountability and legitimacy, especially in higher education, as it contributes to knowledge-based economies and cohesive societies. Higher education contributes to human capital and is linked to improving society ( Godonoga & Sporn, 2023; Sanje, 2012; Singh, 2018;). An interesting contrast has emerged from the findings regarding the understanding that the most

important factor of being an AFU is societal benefit, yet one of the least important influencing factors is corporate social responsibility. I suggest that this disconnected thinking is linked to language and the effect of siloing in academia. I have already presented evidence expressed in the literature and reflected in the data that universities exist to benefit society and support industry through innovation partnerships and societal consciousness. Perhaps this arises because academia is vague about its relationship as a corporate entity and how academia regards itself (Bok, 2004). The absence of a broader thematic approach appears to be a missed opportunity for AFUGN members to boldly implement the AFCP in concurrence with the Ten Principles. Despite being interdependent, findings have revealed a disconnect between societal benefit and corporate social responsibility. It is addressed separately and discussed later in the chapter.

### 6.8.4    *Humanities and Technology*

Humanities and technology were regarded as less critical to implementation by the AFUGN members. These are linked to Principles 5 and 6.  It is an oversight given the rise and importance of technological advances to the Silver Economy (Agosti et al., 2022; Directorate-General for Communications Networks et al., 2018) and the need for universities to generate new revenue streams and change to meet industry demands. Entertainment, communications, robot care, and domestication of technology have exposed older people to advanced technologies (Dickinson et al., 2007). By engaging older people in research techniques, usability researchers can reflect the needs and wants of older people for technologies, an undertaking with financial, economic, political, and ethical implications. This also impacts access routes for diverse population groups and limits participation in online opportunities (Cannell, 2017; European Commission, 2001). Equally, the significant role humanities have in engaging older people, for example, in research and the arts in particular, appears to be omitted in the current discourse on higher education's contributions to ageing populations. It could be linked to who is championing the AFU programme in an institution and the broader issue of the principles being embedded campus-wide.

### 6.9.    **Process of joining the AFUGN**

The survey findings indicated several important elements that influenced joining the AFUGN. These included who and how the AFU concept was advanced, who was

responsible for the final decision to join, and how the Principles would be implemented and resourced.

The suggested process for joining the AFUGN emerged as it developed, in keeping with the recommended approach of asking for a *commitment* to age-friendliness (WHO, 2020), adapted and reflected in the interpretation and implementation of the Principles. It also followed the structure and approach developed by DCU towards elaborating the Principles.

The survey revealed that the universal approach to joining the AFUGN was initiated by a dedicated champion. This individual facilitated **multidisciplinary engagement** by convening a **working group** with stakeholders and aligning the Ten Principles with the university's activities. Anderes (2016) states that planning and engaging in a process helps maximise outcomes quality. Evidence that an initial lack of a prescribed structure was identified as a barrier to engagement (Lim et al., 2022). AFU institutions contributed to high-quality, cohesive membership applications by following a process. It is an approach supported by Dunham et al. (2020), who refer to the importance of documenting instructions as a means of accountability and a strategy to monitor a process.

The universities held internal and external focus groups and discussions to examine integrating the Principles into existing programming, frequently revealing new development and future research opportunities. Interrogating the implementation of the Ten Principles in relation to the vision, mission, strategic plan, and other factors was also recommended and followed by the applicants  (Age-Friendly Hamilton, 2022; Deane, 2017; Raina, 2020a; Strategic Plan Masaryk University, 2021; Vidovićová, 2021; Ward, 2019).

While senior management is ultimately responsible for the organisational activity, its role in supporting the adoption of the Ten Principles contributed to the sense of commitment to implementing them, reiterating research on approaches to change (Zmud & Cox, 1979). To complete the process of joining, in every case, an internal report citing the benefits of joining the AFUGN was presented to the head of the department at the School/Faculty level and escalated to the President's Office to obtain a sign-off, which contributed to confirming institutional commitment. A letter was then issued by the university's president to the President of DCU expressing their commitment to the Ten Principles.

Interestingly, while some adopters of the Ten Principles sent a short letter expressing their interest in joining the AFUGN, for example, Masaryk University, in contrast, other universities (McMaster) presented a substantial body of work at the McMaster as evidence of their ageing work and articulated their plans in great detail.

This approach raises questions about how the relatively simple process of joining the AFGUN has manifested into an evolving, subtly competitive approach to joining the AFUGN. Stigler (1993, p.157) said, "Competition is not a goal: it is a means of organising activity to achieve a goal." Case study respondents reported that confirmation of existing members or sight of other applications provided confidence in the credibility and exclusivity of the AFUGN, which was further secured by the knowledge that the confirmation of acceptance was coming from the president of an institution.

Final approval ultimately lies with senior management. Documenting the process and demonstrating considered and robust evidence to inform its endorsement were key elements of senior management approval. At an institutional level, it also requires examining how the Principles align with internal and external frameworks (mission/vision/strategic plan/institutional, national and global policy, SDGs) to get management endorsement. It concurs with Dickson's (2018) assertion that if "you want people to opt into a process, you need to be able to articulate what is in it for them."

Data suggests that the primary approach to joining the AFUGN was initiated by an AFU Champion who engaged in multidisciplinary engagement (the most common process among the members) by setting up a Working Group with stakeholder input and mapping existing activities involving older people and ageing expertise. McMaster University's and Masaryk University's mapping exercises revealed areas that were working well and needed improvement or highlighted areas to develop. Once they had gathered evidence and proof of support from colleagues, they approached senior management, who gave them a licence to lead the initiative with support from the Provost's office. This approach is recommended by the AFUGN Coordinator, who modelled and elaborated it from the DCU approach to developing the Ten Principles.

The data from the case studies, documentary analysis and literature support this approach (AFU McMaster Committee Meeting Notes, 2019; Löckenhoff et al., 2009; Silverstein et al., 2019) as one of the challenges of becoming an AFU is getting colleagues' support and

senior management approval. Respondents to the case studies reported a positive response from their senior management to committing to the Ten Principles; however, this was not a universal experience, and in some cases, post-COVID approaches, new management structures, or staff changes diminished the importance of implementing the Ten Principles and slipped it further down the institutional agenda.

The data also concur with the literature on change leadership in higher education, which advocates for structured partnerships and multidisciplinary approaches to implementing changes in higher education ( Clark, 2004; Crowther & Green, 2004; Gabay and Voyles, 2022Kerr, 1967;Meister-Scheytt & Scheytt, 2005;; Rowley, 1996;) and the need for change agents who can lead and influence change across institutional borders and changing institutional landscape. The mapping of the Ten Principles provides a framework to contextualise this. McMaster also supplied evidence of regular reviews of the Ten Principles to ensure compliance, and given the length of time as members of the AFUGN, it provided some fascinating insight into the changing needs of the university, significantly pivoting to meet the needs of students, staff, and older people during the COVID-19 pandemic (Raina, 2020a).

### 6.9.1.   Challenges

The application to become an AFU is not without its challenges.  Securing multi-disciplinary and senior management support, institutional approval, and resourcing generated debate and discussion.

### 6.9.1.1 Resourcing the Principles

Survey respondents reported challenges with resourcing the operation and implementation of the Ten Principles. Data reflected a common reaction to implementing change in institutions and was reiterated in the literature (Andreoletti & June, 2019; Lim et al., 2022). The findings indicate that a significant proportion of AFU activities (48.9%) are supported by reallocating existing resources, while a smaller portion (17.8%) depends on voluntary work, institutional service, or seed funding. Only 4% of AFUs have a dedicated budget for implementing age-friendly policies and principles.  Most respondents reported that they do not have a dedicated AFU staff member, and the role is in addition to an existing workload. The members spend an average of three hours per week on AFU-related tasks.

The lack of substantial financial investment in signing up as an Age-Friendly University (AFU) can be seen through a virtuous lens, reflecting a moral commitment to inclusivity and age-friendliness rather than just financial resources. From a virtuous perspective, these are:

**Commitment Over Financial Investment**: This perspective highlights the importance of moral commitment to creating an inclusive environment over the availability of financial resources. Many institutions show genuine dedication by reallocating existing resources or engaging in voluntary efforts, demonstrating that the AFU initiative is driven by more than just monetary investment.

**Value of Institutional Service**: Participation in AFU activities as part of institutional service or voluntary work showcases a culture of service and social responsibility within these institutions. It prioritises the well-being and inclusion of older people, reflecting a virtuous commitment to the community.

**Accessibility and Inclusivity**: The lack of a dedicated budget does not necessarily diminish the initiative's effectiveness or sincerity. Instead, it suggests that becoming an AFU is based on a commitment to inclusivity and making the best use of available resources rather than being dependent on significant financial investment.

In terms of challenges and limitations, these are:

**Sustainability and Scalability**: While reliance on existing resources and voluntary efforts indicates commitment, it may not be sustainable or scalable in the long run. The absence of dedicated funding could limit the scope and impact of AFU initiatives, particularly in smaller institutions that may struggle to allocate resources without specific financial support.

**Resource Allocation and Institutional Priority**: Minimal financial investment might suggest that AFU activities are not prioritised within the institutional budget. This could affect the quality and consistency of the initiatives, and the institution's ability to measure and achieve specific outcomes related to age-friendliness.

**Equity Among Institutions**: The observation that larger institutions may more easily adopt AFU principles without dedicated funding highlights a potential inequity. Smaller

institutions, which often have fewer resources, may find it more challenging to implement comprehensive age-friendly policies, potentially limiting the overall inclusivity of the AFU initiative across the higher education sector.

While the lack of significant financial investment in AFU activities aligns with virtuous principles of commitment and inclusivity, it also presents challenges regarding sustainability, equity, and prioritisation. To fully realise the potential of the AFU initiative, a more balanced approach that includes moral commitment and adequate financial support may be necessary. This approach would ensure that institutions of all sizes can fully participate in and benefit from the AFU network. As reiterated in the case study and literature, the need to involve as many staff as possible (McCaffery, 2010; Silverstein et al., 2019) is almost a prerequisite.  The solution to this would be to convene an AFUGN multidisciplinary Working Group to meet on an ongoing basis to review the Principles and ensure their institutional implementation, as exemplified by McMaster's approach (AFU McMaster Committee Meeting Notes, 2019). An option to address the resourcing challenge could be negotiating a shared resource between faculties and a top slicing of a small percentage of any age-related research funding towards investing it in initiatives to implement the Principles.

### *6.9.1.2 Multidisciplinary engagement and change*

The narrative responses from the survey, which were reiterated in the case studies, indicated that the initiative supervised from a senior management office concurs with literature supporting the assertion that change spans management disciplines (Crowther & Green, 2004) and the effectiveness of ensuring sign-off from the President or the Provost brought credibility to the process of implementing the Ten Principles, making it easier to implement. It was evident in the case studies that "buy-in" from senior management was essential (Anderes, 2016).

### 6.10. Implementation and Interpretation of the Ten Principles

The survey indicates that Principles 1, 4, and 6, which were listed as of most *importance* to respondents, are slightly in contrast to the top three Principles 4, 7, and 1, which were *implemented*.

**Table 6.4. Primary Principles of Importance Vs Primary Principles Implemented**

| Primary Principles of Importance | | Primary Principles Implemented | |
|---|---|---|---|
| **Principle 1** | To encourage the participation of older people in the core activities of the university. | **Principle 4** | To promote intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages. |
| **Principle 4** | To promote intergenerational learning. | **Principle 7** | To increase students' understanding of the longevity dividend and the increasing complexity and richness that ageing brings to our society. |
| **Principle 6** | To ensure the university's research agenda is informed by the needs of an ageing society and how higher education can better respond to those needs. | **Principle 1** | To encourage the participation of older people in the core activities of the university. |

These findings are significant as they reflect the ability of an institution to implement the Ten Principles. Principle 1's ranking third on the implementation list suggests that some institutions find it challenging to implement this Principle. While it is recognised as being of primary importance, there may be challenges in interpreting how to implement the Principle.

The selected Principles in both cases suggest themes concurrent with the findings (from the survey and literature ) - a focus on teaching (Darmalaksana et al., 2018; Fernández-Ballesteros et al., 2012), learning, research (Walker, 2007), intergenerational engagement (Blieszner & Formosa, 2014; Bostrom, 2014), students (Scott, 2021), and societal impact (Boyer, 1966; Jenkins, 1988). These key themes are aligned with the research literature, which informed the Ten Principles. An unexpected finding is the relevance of language and culture to implementing and interpreting the Principle.

**Table 6.5. Key Themes Informed by Primary Principles of Importance and Primary Principles Implemented**

| | |
|---|---|
| **Principle 1** | Teaching/Learning/Research - Participation |
| **Principle 4** | Intergenerational Engagement |
| **Principle 6** | Research Agenda and Institutional Recognition |
| **Principle 7** | Longevity Dividend/Student Impact/Societal Impact |

The survey data indicated that the Principles are incorporated into the existing body of work (50%). This suggests that the institutions (or Age-Friendly Champions) are already working in the ageing arena, as exemplified by case study examples. The extent of implementation is influenced by the School/Faculty responsible for the Ten Principles. Survey data suggest that institution-wide implementation is limited to a few AFUGN members. The case study findings also slightly differ from the survey findings. While McMaster embraced all Ten Principles, assigning each equal importance, Masaryk University indicated that Principles 6 and 7 were secondary to other Principles.

### 6.10.1  Challenges to Implementation

Survey respondents reported that challenges to implementing the case study arose from a need for more procedures and guidance on implementing the Principles (Silverstein et al., 2019). Joining the AFUGN encouraged multidisciplinary communications and collaboration and increased awareness of age-friendly activities. One university developed a webpage of resources to inform the implementation of the activities, and another convened a Senate Committee to provide visibility, support, and oversee the Principles, but these were in the minority.

Another primary challenge was engaging colleagues working in other disciplines or being concerned about the validity of transitioning to an AFU and understanding it in the context of their work.

The COVID pandemic also impacted the AFUGN's growth. As universities had to pivot rapidly to meet the needs and demands of more pressing matters, the AFUGN's growth slowed as institutional priorities were recalibrated.

### 6.10.2  An Approach to Implementing the Ten Principles

An approach to implementing the Principles used by DCU engaged the Ten Principles under 5 Pillars: Research and Innovation, Teaching and Learning, Intergenerational and Lifelong Learning, Civic Engagement, Encore Careers and Enterprise, and Institutional Change (O'Kelly, 2014b). This micro-productivity approach was developed for several reasons. One person cannot know everything – the knowledge and expertise of a multidisciplinary approach are essential to provide a mechanism for input from experts in those disciplines. It also provides a procedure that sets goals and offers a structure for regular feedback, reducing the process to achievable, measurable outcomes. The process showcased DCU's approach to implementing and interpreting the principles as it offered a structure institutions could follow and, with the support of the AFU Coordinator, helped them navigate the process of interpretation and implementation. There was no evidence from the survey that this approach was adopted. The case study of McMaster indicated that they used the structure as an initial method to inform the formation of their Working Group, which informed a model best suited to their needs.

### 6.10.3  Examples of Implementation and Interpretation from Case Studies

Two case studies were chosen from the many activities at McMaster University and Masaryk University to demonstrate their different approaches to illustrate the approach to implementing and interpreting the Ten Principles.

#### Masaryk University Example

At Masaryk University, a respondent shared an experience of encountering challenges while collecting data about retired staff, highlighting the difficulty in gaining support to engage with the Ten Principles. Initially, the technical support department failed to see the relevance of this task to their work. However, after discussions, they recognized the potential benefits of collecting such information to inform their age-friendly approach.

With guidance from the AFU Champion, they found ways to incorporate elements of the Ten Principles into their practices rather than dismissing them outright (Vidovićová, 2022). The AFU Champion also collaborated with the staff development department to address language and attitude through pedagogical competence development programs, promoting generational inclusivity in the classroom. Additionally, they applied the principles of an existing gender audit to ageing, integrating them into the audit process (Vidovićová, 2022). The reluctance of staff to engage with the AFU concept stemmed from a lack of knowledge and understanding of its relevance beyond the ageing domain and how to apply the Principles to their work

### *McMaster University Examples*

McMaster fully embraced the Ten Principles across campus. Their Civic Engagement Office drafted a civic engagement plan that was not only cognisant of older people's needs but also engaged students and faculties by asking them to examine their work and explore how they could be more age-inclusive – in language use, engagement, intergenerational opportunities and research. Interdisciplinary fellowship grants were provided to support postgraduate researchers beyond traditional gerontology and from diverse specialisations and domains to carry out interdisciplinary research emphasising on co-created design thinking and concurrent solution-focused responses. This contributed to a "research dream team" and informed a strategic approach to integrating end users into projects moving from a problem-focused approach to a solution-focused one. Similarly to Masaryk University, staff and students engaged when they realised there were no constraints to a more fluid and innovative interpretation of the Principles rather than a very structured prescribed approach. The organic approach to the implementation was fully embraced.

These examples contribute to a broader overall question about the purpose of a university previously explored in the literature (Jenkins, 1988; Peirce, 1966) and the need to recognise the link between academic and civic cultures, human value, and market forces and its impact on the quality of life for all (Boyer, 1996; Miller, 2019).

### *6.10.4  Extent of Implementation*

Survey data suggest the principles are implemented actively when the President's office leads the initiative but less actively when a specific school or faculty leads it ( Anderes,

2016; Clark, 2004; Crowther & Green, 2004). Although the very active implementation of the Principles is almost non-existent, there is a more significant trend towards passive implementation. Both case studies reflect that the success of the implementation of the Ten Principles was directly aligned with their president's endorsements at an institutional level. The Principles are primarily interpreted in the context of social gerontology, guided by the Age-Friendly Champion's traditional role in each institution as Age-Friendly Champions working in social gerontology are primarily concerned with improving core ageing, as those with a professional interest in this area may have a broader comprehension of the need to have an organic, holistic approach to ageing as they understand it in the many contexts referred to in the literature such as active ageing or successful ageing.

At a micro level, while the Principles are implemented in a School or Faculty in a centralised way, implementation is more passive at a broader level and implied rather than explicit. Case study respondents confirmed that it also addressed future implications of AFUGN membership. Although there was a level of institutional latitude to interpret the Ten Principles in the context of mission and programme-specific goals, ultimately, embedding the Ten Principles as policy is driven by the President and governing authority on what is best for the institution.

### 6.10.5  Influence of the Ten Principles on Policy

The Ten Principles are not reported as being explicit in the institutional policy of the AFUGN members. Although Ball (2012, 2015) acknowledges policy as both text and discourse, it may be developed through complex, ongoing, interactive mediated and embodied processes open to multiple interpretations. It concurs with survey data and case study reports from McMaster, which embraced all Ten Principles and Masaryk University, which concentrated primarily on six of them. However, data shows that the Principles are not explicitly embedded in university policy. They are, however, embraced under the equality, diversity, and inclusion efforts of the majority of the survey participants and are referred to in the strategic plans of the case study respondents. Overall, they do not explicitly influence decisions at an institutional level. However, the Principles are reflected in national and global education policy (Department of Further and Higher Education, Research, Innovation and Science, 2019; Higher Education Authority, 2018; UN, 2016, 2018; WHO, 2020).

Embedding the Ten Principles as policy in higher education requires a desire to embed change, and the relatively new concept of AFUs may not yet be established enough to inform the type of changes needed to impact higher education fully (Aktas, 2021; Bates, 2010; Rowley et al., 2001). While some innovative approaches to implementing the principles were reported in the case studies, joining the AFUGN was a catalyst for engaging and increasing age-awareness activities. Case study respondents contemplated that the AFU initiative was timely more than strategic as there was, at the time, an institutional focus on hiring more older people, which coincided with their broader strategic direction and national policy. It contrasts change literature, which cites the need for strategic questions to inform change from different aspects (Rowley et al., 2001) and challenges the role of higher education and the ability of universities to adapt (Carey, 2022) rather than react.

Aligning institutional policies with the Ten Principles of an Age-Friendly University can potentially transform higher education profoundly. Universities can create more dynamic, inclusive, and effective educational environments by addressing societal needs, promoting inclusivity, fostering interdisciplinary collaboration, embracing digital transformation, and supporting lifelong learning. These principles enhance the educational experience and contribute to long-term strategic goals and societal progress, ensuring that institutions remain relevant and impactful in an ever-changing world.  A broader outline of potential policy implications and how they can influence future higher education Strategies is elaborated in Appendix X11.

### 6.10.6. Developing Internal Principles

The generic and holistic approach to the Ten Principles does not preclude a university from developing additional Principles. As previously stated, the interpretation and implementation of the principles must be relevant to the institution to inform change and promote action.  It is actively encouraged if the Principle is developed using a participatory approach and is relevant to the commitment to being an AFU. It is beneficial to have a time-bound principle that sets out a goal by which a principle is embedded, for example, more engagement with retirees. Just as a strategic plan needs to be an action document, the same applies to a Principle. This concept was proposed to give institutions a sense of ownership and investment in implementing the Ten Principles (Colgan, 2013). At the time

of this research study, there was no example of an additional Principle being developed by an institution.

### 6.10.7 External Collaboration on Implementing the Principles – University of the Third Age

The growth and popularity of the U3A movement bring a holistic approach to learning and provide opportunities to meet new people and engage in peer learning.  Interestingly, many universities globally support the U3A entity to work in a complementary way and collaborate with them to engage older people in their learning environments (Baschiera, 2019; Formosa, 2019; Guðmundsson, 2019; Lim et al., 2022; Masaryk University, 2023). The holistic and organic approach to implementing the Ten Principles in the case study supports a cultural and institutional approach, providing universities with a broader opportunity to engage with older people on a multidisciplinary level rather than just providing educational programmes (Masaryk University U3A, 2021).

## 6.11    Interpreting the Principles

The survey reveals that the Principles are primarily interpreted and implemented in the context of social gerontology (Tibbitts, 1960), quality (Wahl et al., 2009), and health/wellness (Beard et al., 2016).  An exploration of the literature to support the Ten Principles of an AFU showed a body of evidence as to the relevance of each of the Principles to higher education. The survey data, case studies, and documentation support this and demonstrate the efficacy and relative ease of implementing programmes that can be closely aligned with the Ten Principles. For example, McMaster's extensive work at the Institute for Research on Ageing (MIRA) brought about positive change for older people through better coordination of their programmes, influencing ageing-related research across all faculties within the university, contributed to promoting ageing, and was also closely aligned to their institutional mission and vision. The provision of golf buggies to facilitate older people's access to campus was an innovative response aligned with the volunteering spirit promoted by McMaster. It also complied with elements of the thematic age-friendly cities approach. It satisfied an equality, diversity, and inclusion component of the institutional approach to serving the broader community, as accessibility is an issue given the university's geographical location, lack of public transport, and cost of daily parking (Institute for Research on Ageing, 2021).

Both McMaster University and Masaryk University tangibly demonstrated the Principles in action. McMaster's complete implementation of the Ten Principles is reflected in their initiatives and supported by academic literature (Bjursell, 2019; Darmalaksana et al., 2018; Schuller & Watson, 2009;). McMaster's invitation to invite stakeholders to contribute to co-created design explicitly demonstrated Principle 10 in action, as they engaged with the community's broader stakeholders and addressed accessibility issues (Shared Purpose McMaster University, 2010). Similarly, programmes delivered by MIRA included a range of stakeholders (e.g., staff, students, older people) and collaborative agencies working in the ageing arena.

Masaryk embraced an opportunity to offer language courses to older people and found that they had advantages as learners because they already had some effective study habits that made the process easier, had larger vocabularies, and could draw on knowledge and experience to make associations. The overall benefits of learning a language at an older age are reflected in research that found foreign language learning could constitute an attractive and enjoyable opportunity to promote cognitive reserve, develop new neural pathways, make new connections, and add flexibility, thus contributing to healthy cognitive ageing (Grossmann et al., 2021).

### 6.11.1 Language and Cultural Relevance

The relevance of the cultural approach to ageing raised by the case study respondents emerged as a key theme. Findings from the survey support evidence in the literature (Chonody & Teater, 2018) that there is a different approach to ageing from a continental perspective. Literature supports the relevance of cultural attitudes and practices towards ageing on other continents (Löckenhoff et al., 2009). Observations outlined previously informed the rationale for choosing case study research on two continents.  For example, a comparison of attitudes and policies towards ageing (Table 5.29) reflects the cultural contexts of Canada and the Czech Republic.  It will inevitably influence the priorities and implementations of AFU principles. These differences underscore the importance of tailoring AFU initiatives to reflect and respect local cultural norms and values, ensuring they meet the specific needs of older people in each society.

In the United States, the literature emphasises living longer and working for longer. It  is demonstrated by the number of universities engaged in retirement transition programmes

that promote encore careers and the added benefit of generating new revenue streams. In contrast, in other parts of the world, there is less emphasis on extending working life and more on the overall quality of life and positive and active ageing.

Age-bias references and infantilising language are often used to refer to older people. Phrases used such as elderly, grey folks, geriatric, golden agers, seniors/senior citizens, pensioners, active aged, old fogeys, old timers, retirees, and the silver voters diminish the agency of older people who are often subjected to "benevolent speak" (Epstein et al., 2023), even by those working in the ageing arena as well as those outside of it. It is essential to get the language correct by using the phrase "older people" and subtly challenging the use of ageist language by avoiding words such as "old and wise," "young at heart" or "still" – "working/riding a bike" or describing older adults as weak, frail, or vulnerable. Even imagery can be challenged to discourage using images of older people with walking sticks or wrinkled hands or, conversely, white and middle-class older people scaling a mountain or jumping from a plane (Elyse, 2022).

Equally, the various interchangeable terms (e.g., positive ageing, active ageing, successful ageing, active ageing) and conceptualisations identified in the literature (Foster & Walker, 2013; Gullette, 2004; Medawar, 1952; Nilsson, 2016) add a layer of complexity to articulating an approach to ageing depending from which discipline it is being approached.

Though designed to be inclusive and broad, the Ten Principles have several notable disadvantages when applied generically. One key issue is their lack of specificity, which can lead to varied interpretations and inconsistent implementation across different institutions. Without clear guidelines, universities might find translating these principles into concrete actions challenging. This ambiguity also complicates the development of specific metrics for assessing progress, making it difficult for universities to evaluate the effectiveness of their age-friendly initiatives and demonstrate tangible outcomes.

Another concern is the limited accountability that comes with broad principles. Institutions may claim adherence without making substantial changes or investments without clear definitions. This can lead to the risk of superficial adoption, where universities focus on symbolic gestures rather than meaningful changes. The generic nature of the principles may also fail to address the unique needs and circumstances of different universities and

their older populations, necessitating more tailored approaches to effectively support diverse groups of older people.

Moreover, vague language can hinder stakeholder engagement, as it becomes challenging to communicate goals, expectations, and roles effectively to faculty, staff, students, and community partners. This lack of clarity can also impede policymakers from developing and implementing effective policies based on the principles, as specific, actionable guidelines are essential for creating impactful, age-friendly practices. Finally, without precise language, universities might struggle with inadequate resource allocation, as clear principles are necessary to ensure that funding and efforts are directed toward initiatives that genuinely benefit the older adult community.

### *6.11.2 Factors that influenced implementation and interpretation*

The non-prescriptive approach to implementing and interpreting the Ten Principles was a specific strategy of the DCU Working Group (Colgan, 2012). The challenge of coalescing the breadth of activities at other universities into a rigid framework was not feasible, and it is reflected in how the Ten Principles are articulated. This flexible approach contributed to the popularity of the AFU concept but was proportionately confusing as universities often struggled with implementing and interpreting the Ten Principles (Lim et al., 2021). Staff working beyond the ageing arena, even when supportive, found operationalising and implementing the Principles challenging in their practice (Silverstein et al., 2019).

Examining the traditional university model, young students benefit from the tuition, guidance, and wisdom of more senior, typically older, academic staff. There is at least an implicit assumption that contact between the generations is a core feature of what universities do (Scharf, 2016). The traditional university model faces several challenges: rising demographics (Boyer, 1996; Peirce, 1966), migration flow and a drop in fertility (Jenkins, 1988), which impact numbers and pressures to make third-level experiences more meaningful to the community, local economy, and social development. It concurs with the experiences of Masaryk and McMaster universities that were reported in the case studies.

## 6.12    Conclusion

This chapter recaps the study and identifies its relevance to the corpus of knowledge. It then discusses the literature and the previously presented findings.

The factors to consider when becoming an AFU are specific to each institution, as the Principles are interpreted and implemented on an institutional basis. There are more benefits to explicitly harnessing the Principles as a tool to inform and articulate a university's response to the SDGs and the AFCP than are currently being realised.

Higher education is central to future economic development, and there are broad social and cultural advantages to widening participation. Higher education capacity will almost double over the next twenty years, with most growth coming from non-traditional areas. The workforce's need for lifelong learning and upskilling will also contribute to growth. Increased capacity, while benefitting universities, will also bring serious challenges in human resource practices, funding, and operational matters, which must be faced confidently and with a firm resolve toward innovative, practical solutions.

There is a need to ensure that all stakeholders have input into becoming an AFU and contribute to implementing the Principles to ensure that existing expertise is recognised and facilitated to advance the AFU concept, to develop opportunities and benefits of mutual learning throughout the AFUGN, and to share experiences and research that impact students, staff, and communities.

The next and final chapter outlines some thoughts and recommendations to advance AFU practices and considers the future development of the AFUGN.

# Chapter 7: Conclusions and Recommendations

*Reasoning draws a conclusion, but does not make the conclusion certain unless the mind discovers it by the path of experience.* – **Roger Bacon (1928)**

## 7.1    Introduction

This study explored the factors and processes of becoming an AFU and how the Ten Principles of an AFU were interpreted and implemented. The study arose from my interest in how higher education responds to rising global demographics and a need to explore a new paradigm in higher education by explicitly engaging with ageing. It examined why universities joined the AFUGN and how they have implemented the Ten Principles of an AFU. It also examines higher education in the context of the Age-Friendly Cities approach. As AFUs are an emerging phenomenon, this study is an initial exploration of the concept and of the rationale for becoming and remaining an AFU and it offers recommendations for further research.

The WHO addresses population ageing and urbanisation's enduring effects by promoting healthy and active ageing through the AFCP. Universities may play a unique role in this endeavour by adopting and applying the Ten Principles of an AFU. This fosters lifelong learning, multi-generational interaction, and awareness about ageing among students while advocating for the advantages of longevity. Additionally, it facilitates institutional change and a unified approach to policy, research, teaching, and learning.

Chapter 1 introduced the background of the research study. Chapter 2 outlined the rationale of the AFU. Chapter 3 examined the corpus of literature relevant to ageing more broadly, the language of ageing, what informed the Ten Principles of an AFU, changes in university life and cultural approaches. Chapter 4 outlined the methodology and the approach to the study. Chapter 5 presented the research findings using tables, figures, and the narrative response from the respondents. Chapter 6 discusses the results with reference to the literature, cultural impact, sustainable development goals, corporate social responsibility, age-friendly cities approach and their relevance to becoming an AFU. It also discussed the role of universities in the future and the need to meet the demands of a new demographic.

**7.2    What the Research Revealed**

The key findings of the research revealed that factors of importance to AFUGN members in deciding to become and remain an AFU were:

- The benefit to society.
- Embracing age-inclusivity in higher education through the equality, diversity, and inclusion agenda.
- Fulfilling the institutional vision and mission.
- Improving the public profile of the institution.
- Promoting intergenerational learning.
- Advancing the longevity dividend to students.
- Harnessing research collaborations.
- Contributing to civic engagement.

The importance of the Principles was not directly aligned with the implementation of the Principles. However, the influencing factors for joining were reflected in the Principles.

The Ten Principles offer a framework to inform the factors that meet institutional needs. However, other aspects of the research revealed a more ambiguous and unexpected response to the factors and the interpretation and implementation of the Principles. These have broader implications for the existing membership and those wishing to join the AFUGN in the future. It is evident that a non-prescriptive approach to joining the AFUGN has worked well and resulted in a diverse and vibrant membership working with innovative approaches to addressing an ageing population and contributing to the many research opportunities in the ageing arena.

**7.3    Recommendations**

The recommendations derive from the study's findings and are categorized into two distinct levels: institutional and global AFUGN. Additionally, suggestions for further research are included.

### 7.3.1   *Institutional Level Sustainability*

Sustaining an Age-Friendly University (AFU) involves ensuring that policies, practices, and resources are in place to inform the Principles and increase age inclusivity in higher education. It requires ongoing commitment, adaptation, and integration of age-friendly principles into the university's core functions. Key strategies to ensure the sustainability of an Age-Friendly University include:

**Institutional Commitment**

- **Leadership Support**: Sustained commitment from university leadership is crucial. It includes formal policies endorsing age-friendly principles and the integration of these principles into the university's mission and strategic plans.
- **Dedicated Offices or Committees**: Establishing dedicated offices or committees to oversee age-friendly initiatives ensures a continuous focus on promoting and monitoring these efforts.

**Policy Integration**

- **Inclusive Policies**: Implement policies that support the participation of older adults in all aspects of university life, including admissions, hiring, and campus services.
- **Lifelong Learning Programs**: Develop and sustain educational opportunities tailored to older adults, such as lifelong learning institutes, certificate programs, and flexible course schedules.
- **Language**: A future review of the Ten Principles could provide a chance to revise the language, shifting from broad statements to more specific actions that directly influence policy.

**Funding and Resources**

- **Financial Support**: To support age-friendly initiatives secure funding through university budgets, grants, and partnerships. It may include scholarships for older

adults, funding for research on ageing, and resources for age-friendly campus modifications.

- **Sustainable Models**: Explore sustainable funding models, such as endowments or alumni contributions, earmarked explicitly for age-friendly programs.

## Curriculum and Research Integration

- **Curriculum Development**: Incorporate ageing-related content into existing courses and create new courses focusing on ageing issues, ensuring that all students, regardless of their major, gain an understanding of ageing.
- **Research Initiatives**: Promote and support research on ageing across disciplines. Encourage interdisciplinary research that addresses the needs and challenges faced by older adults.

## Infrastructure and Accessibility

- **Campus Modifications**: Ensure that campus facilities are accessible to older adults and include physical accessibility (e.g., ramps, elevators, clear signage) and technological accessibility (e.g., user-friendly websites, accessible digital resources).
- **Health and Wellness Services**: Provide health and wellness services that cater specifically to the needs of older adults, including fitness programs, advocacy services, and healthcare support.

## Community Engagement and Partnerships

- **Local Partnerships**: Build partnerships with local organisations, businesses, and government agencies to support age-friendly initiatives. This can provide additional resources and opportunities for older adults.
- **Alumni Networks**: Engage alumni, particularly older alumni, in university activities. This can include mentoring programs, volunteer opportunities, and lifelong learning initiatives.

**Continuous Evaluation and Improvement**

- **Assessment and Feedback**: Regularly assess the effectiveness of age-friendly initiatives through surveys, focus groups, and feedback from older adult participants. Use this data to make continuous improvements.
- **Benchmarking and Reporting**: Benchmark progress against other age-friendly institutions and report on outcomes to stakeholders, including university leadership, faculty, students, and the community.

**Cultural Change**

- **Awareness Campaigns**: Conduct campaigns to raise awareness about the importance of an age-friendly university and to promote positive attitudes towards ageing within the campus community.
- **Intergenerational Programs**: Foster intergenerational programs and activities encouraging interaction and mutual learning between younger and older students.

Sustaining an Age-Friendly University requires a comprehensive approach that integrates age-friendly principles into the fabric of the institution. By ensuring strong leadership support, inclusive policies, dedicated funding, curriculum integration, accessible infrastructure, community partnerships, continuous evaluation, and cultural change, universities can create an enduring environment that supports and celebrates lifelong learning and engagement for older adults.

*Staff*

All staff should be informed and encouraged to engage with the Ten Principles. It could be achieved by:

- Targeting new staff at orientation meetings about the Ten Principles and how to get involved.
- Incentivising staff to get involved through funding age-related research or scholarships.
- Facilitating retirees to remain actively engaged by providing opportunities to deliver or take programmes at the university, allowing them to retain their email

addresses and university connections. It maintains institutional legacy and recognises their contribution to the institution's work.

*Students*

Universities could spearhead local, national, and global events similar to those in the LGBQTI and sustainability sectors to elevate ageing issues, actively promote intergenerational engagement, and show the benefits of the longevity dividend. An emerging movement marking "Global Intergenerational Week" in April each year raises awareness of the value of intergenerational engagement, but it is at an early stage and needs support to flourish.

### 7.3.2 AFU Global Network Level

*Sustainable Development Goals*

While extended life expectancy is to be celebrated, the global decline in fertility and population ageing are causes for concern. However, Africa is experiencing a different demographic trend, with many countries still seeing population growth due to higher fertility rates. Cultural devaluation of older people to support sustainable development must be addressed in a multi-generational way. Universities have a clear role, especially as the SDGs have been relaunched (Department of the Environment, Climate and Communications, 2023) and SDG Champions appointed to ensure everyone can contribute to their success. Universities should embrace and harness the advantages of utilising the Principles to satisfy the SDGs as a global mechanism to contribute to the SDGs.

*Age-Friendly Cities Programme*

The AFCP offers an inclusive approach to diversity, inclusion, and cohesion, making communities barrier-free and promoting participation and wellbeing for all. As part of the universal design ethos, it is particularly relevant to create environments that are easy for people to use and reflect that all people experience changes in their abilities as they progress through the different stages of life. However the Age-FriendlyCities Programme,

while noble in its intentions, may be overly ambitious in its scope and objectives. This critique is rooted in several key challenges and limitations

The movement aims to address a wide array of issues that affect older adults, ranging from improving physical infrastructure and housing to enhancing social participation and healthcare. Such a broad agenda can dilute focus and resources, making it difficult to achieve tangible results across all areas simultaneously. Buffel et al. (2012) noted that the expansive goals of age-friendly initiatives can sometimes lead to overextension and unrealistic expectations. Implementing comprehensive age-friendly initiatives requires significant financial, human, and organisational resources. Given the reality of limited funding and competing demands, age-friendly programs often struggle to secure the necessary support. Stafford (2018) highlights the challenge of aligning ambitious goals with the available resources, suggesting that without adequate funding, these programs risk being unsustainable. The success of age-friendly initiatives is challenging to measure due to their broad and varied goals. This can lead to difficulties in demonstrating effectiveness and securing ongoing support. Researchers such as Lui et al., (2009) have pointed out the lack of robust, evidence-based assessments to track the progress and impact of these initiatives, which hinders accountability and continuous improvement. The older adult population is highly heterogeneous, with varying needs, preferences, and capacities. The ambitious nature of the age-friendly movement may not always account for this diversity, leading to solutions that are too generalised and not sufficiently tailored to specific subgroups of older adults. This is echoed by Rémillard-Boilard, Buffel, and Phillipson (2021), who emphasise the importance of recognising the complexity and heterogeneity of the ageing population in implementing effective age-friendly policies. There is a concern about the long-term sustainability of age-friendly initiatives. Without continuous funding and political will, these programs may face challenges maintaining momentum and achieving lasting impact. Phillipson and Grenier (2021) argue that while initial efforts may show promise, the real test lies in the sustained commitment to these initiatives over time. In summary, while the Age-friendly movement is commendable for its comprehensive and inclusive vision, it faces significant challenges, which contribute to the perception that it may be overly ambitious in its current form.

### 7.3.3   Ten Principles of an Age-Friendly University

The generic aspect of the Ten Principles facilitates an organic, holistic approach to implementing and interpreting the Principles that are still relevant to the AFU concept. The option to develop an individually relevant Principle provides scope for adding specific areas of concern. However, as changes in global and national policies emerge in society, a review of the principles to ensure they remain relevant and fit for purpose is recommended. As universities embrace multi-generational campuses, utilising the domains of the AFCP and structure offers a mechanism to complement the Ten Principles and make their campuses and the built environment more inclusive. However the long term approach and utilisation of the Principles  may need to be addressed to ensure sustainability.

### *Engagement with Industry*

Adopt a formal, universally agreed-upon template for AFUGN members in each region to leverage the Ten Principles effectively. This template will facilitate engagement with communities, particularly in industry, and provide a structured mechanism for the sector to fulfil societal responsibilities by supporting research and engagement. Such a standardised approach will make it easier for industry to collaborate with Age-Friendly Universities (AFUs).

### *Create an AFU Taxonomy*

Create an AFU taxonomy to structure and index accumulated information, making it more accessible and usable. This taxonomy will enable users to easily find the information they need and promote a universal understanding of the specific language and impact of age-friendly initiatives.

### *Communications and Sharing*

Encourage AFUGN members to provide examples and share their experiences implementing the Ten Principles, particularly those they found challenging. This exchange of best practices and lessons learned will support other members in overcoming obstacles and effectively adopting the principles.

*The Vision for AFU Members*

Establish a learning academy or observatory to facilitate research collaborations and enable AFUGN members to learn from each other's experiences. This platform would address the membership's strong interest in mutual learning and support the sharing of best practices and insights (Harrington, 2021; Vidovićová, 2022).

## 7.4 Further Research Opportunities

The Age-Friendly University (AFU) initiative presents numerous opportunities for research development across various disciplines and sectors and contributes to research advancement:

- **Interdisciplinary Research**: AFUs encourage collaboration among academic disciplines, fostering interdisciplinary research endeavours. By bringing together experts from gerontology, psychology, sociology, public health, architecture, and urban planning, AFUs can address complex issues related to ageing from multiple perspectives.
- **Longitudinal Studies**: With investment, AFUs could provide an ideal setting for conducting longitudinal studies to understand the ageing process. Researchers can explore aspects of ageing, including physical health, cognitive function, social relationships, and quality of life, by following cohorts of older people longitudinally within the university setting. This should be explored in the future.
- **Applied Research**: AFUs offer opportunities for applied research that directly benefit older people and the wider community. Researchers can collaborate with local organisations, government agencies, and community groups to develop and evaluate age-friendly interventions, programs, and policies to enhance the well-being and inclusivity of older populations.
- **Technology and Innovation**: AFUs serve as hubs for innovation in technology and design to support ageing-in-place and active ageing. Researchers can explore developing and implementing age-friendly technologies, such as smart homes, assistive devices, digital health solutions, and virtual reality applications, to enhance older people's independence, safety, and quality of life.
- **Intergenerational Research**: AFUs promote intergenerational interactions and learning opportunities between older people, students, faculty, and community

members. Researchers can investigate the benefits of intergenerational programs
and initiatives on social connectedness, mutual understanding, and knowledge
exchange across generations.

- **Global Collaboration**: AFUs provide a platform for international collaboration
and the exchange of research findings, best practices, and innovative approaches to
ageing. Researchers can participate in cross-cultural studies, comparative analyses,
and joint research projects to address common challenges and promote age-friendly
practices worldwide.

Age-friendly universities offer a rich and diverse research landscape, spanning
interdisciplinary, applied, policy-oriented, technological, intergenerational, and global
research initiatives to enhance the well-being and inclusivity of older people in society.
The emerging concept of the Age-Friendly University (AFU) presents a shared mission
for higher education, serving as a unifying force across disciplines. By embracing a
universal approach to ageing, universities have the potential to transcend traditional
internal divisions, commonly referred to as silos. This shift offers boundless
opportunities for research, policy development, and practical implementation at both
multidisciplinary and institutional levels. Such a holistic approach fosters collaboration
and innovation and effectively addresses the diverse needs of ageing populations.

## 7.5    Limitations of the Study

The survey participants and case studies from this study comprised members of the
AFUGN, although the researcher selected the qualitative case studies; therefore,
generalising the findings in a global context is a challenge as the cultural approaches to the
AFUGN are a significant consideration.

During this study, the author served as the AFUGN Coordinator, influencing the strategies
for achieving AFU status and guiding the growth of the AFUGN. It is important to note
that alternative approaches may lead to different results under varied global leadership
models or when conducted by a researcher external to the AFUGN.

While the study did not primarily focus on gathering evidence from students and older
people regarding the institution's age-friendly status, acknowledging this limitation would
benefit future research significantly by incorporating their perspectives. Including these

groups would provide a more comprehensive understanding of the impact and effectiveness of age-friendly initiatives.

Equally, while there is a concern about insider research, the author would posit that coming from a broader advocacy background and developing AFUGN as a new concept is the genesis of a unique attitude about the topic, as well as an approach to realising the asset that older people are to higher education that brought increased awareness beyond the typical regard that higher education is to society. Equally, there may be a bias towards demonstrating the more positive aspects of the AFUGN.

The study upheld systematic procedures and ensured a transparent presentation of research findings, despite the author's role as the AFUGN Coordinator and their intimate knowledge of each member. The questions centred on universities' specific experiences rather than delving into broader aspects of the AFUGN or the AFUGN Coordinator's role.

Data were collected at a specific time and during the COVID-19 pandemic, which may have impacted the importance of addressing the Ten Principles of an AFU as universities were pressured to meet the needs of the traditional student cohort in an unprecedented global situation. Also, as time passes, leadership, new management changes, and competing priorities may influence the opportunity and momentum to implement the Ten Principles.

## 7.6    Conclusion

This study explored the influencing factors and process of becoming and remaining an AFU. These have been analysed and discussed in the context of relevant literature and examples from the case study. The study provided a snapshot of the AFU movement's breadth of work and impact. Given the rapid effect of social, economic, and environmental changes in future decades, the vision for the AFU to be globally adopted has particular urgency. Committing and implementing the Ten Principles of an AFU proposes changes to higher education, allowing more inclusive access to education and lifelong learning and breaking down socioeconomic and cultural barriers. The future of the AFU movement is positive. However, it necessitates significant shifts in the form and structure of higher education to meet the challenges posed by demographic shifts, capitalise on the

opportunities presented by a growing global population, and drive radical changes in higher education to embrace the opportunities of rising global demographics.

Since the commencement of this study, significant changes have occurred in the leadership and organisation of the Age-Friendly University Global Network (AFUGN). Oversight of this Secretariat is shared by an executive board jointly headed by Arizona State University and the University of Strathclyde, with Dublin City University (DCU) in a support role. However, DCU's Age-Friendly University (AFU) Coordinator continues to offer informal support to universities interested in joining the AFUGN. Additionally, the application process has moved to an online structured format based on the engagement process over the past few years. The requirement for signoff by the President of the lead institution is no longer in place, potentially impacting the credibility of the process and implications for institutions seeking to join the AFUGN in the future.

While the new structure is developing, there are potential areas for concern. Eliminating the dedicated AFUGN Coordinator role marks a significant shift and may erode the collective knowledge base that unifies the membership. As the AFUGN transitioned to a regionalised model, the absence of a central figure will begin to show its effects. Without a dedicated coordinator to maintain cohesion, expertise may fragment across the regions. This fragmentation may lead to consistency in information and practices, pushing regions and individuals to fill the gaps in knowledge on their own. As a result, subtle competition may emerge, with each region striving to assert its methods and approaches, and there is potential for larger regions to monopolise the focus of the AFU. It is also of concern that as regions begin operating independently, they might often compete with one another, which is healthy in some respects but could potentially undermine the spirit of the Ten Principles. Resource allocation will become another battleground. Each regional lead will have to invest resources and attract more attention and funding to build its regional base. Amid these changes, leadership vacuums can emerge due to a shift in institutional priorities, deployment, or retirement. The absence of a central dedicated figure may create opportunities for individuals or groups to vie for influence within the AFUGN. This struggle for recognition and control may add another layer to the competitive environment as members seek to establish their authority in the new structure.

Although it is still early days for the new Secretariat as it strives to establish its footing and identity, this transition holds great promise. By keeping an open mind on the global unity

and impact of the AFUGN, the Secretariat can lay a strong foundation for further expansion, fostering authentic growth and meaningful progress on a broader scale.

This study represents the inaugural exploration of the influencing factors and processes involved in attaining and sustaining Age-Friendly University (AFU) status. It is an aspiration that this study will serve as a catalyst, showcasing and emphasising the myriad opportunities inherent in embracing the AFU concept and igniting a vital discourse surrounding the role of universities and the potential for radical reimagination. By widening participation and fostering age-inclusive environments, universities can better serve the diverse needs of multiple generations, thus propelling us towards a more equitable and inclusive future.

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# Appendices

**Appendix I - Ageing in Ireland – Historical Context**

Similarly to England, Ireland's public support system for older people traces back to the 18th century. Although there was not specific aid designated exclusively for older people, assistance was extended to those who were impoverished, ill, disabled, or unable to support themselves, aligning with the support offered to others facing comparable circumstances (Ottoway R., 2004). In 1908, the Old Age Pensions Act was passed, which provided a scheme for non-contributory old-age pensions subject to a means test at 70 (a means test means that eligibility or entitlement to a specific benefit, service, or assistance is determined based on an assessment of an individual's financial situation or means. In other words, before someone can receive the benefit or service, they must undergo an evaluation of their income, assets, or other financial resources to determine if they meet the criteria for assistance. This assessment helps ensure that limited resources are allocated to those who need them the most while also preventing misuse or exploitation of the system). It was the first scheme in Britain or Ireland to cover the whole population and be financed by the government. There were far-reaching changes in health and social services administration and scope when the State was established in 1922. These included older people's needs in a broad framework (administration, county homes, hospitals and voluntary homes, domiciliary and outpatient health services, housing, social welfare services, and voluntary organisations). Older people's housing, for example, is not shown in the historical records of Irish public authorities as a separate or particular problem because of the more pressing demands for housing for large families. However, by the late 1960s, older people's housing was recognised as a distinct and separate problem. An interdepartmental committee set up by the Ministry for Health examined ageing under the abovementioned framework. It recommended establishing a National Council for the Aged (NCA) to coordinate public and voluntary efforts to benefit older people. It was set up in 1981 as an advisory body in the Department of Health (Dept of Health, 1968).

Continuous improvements to services beyond those recommended in the 1968 report were advanced to benefit a growing population of older people. However, inequality and living conditions were still an issue, and a 1980 report from St. Vincent de Paul highlighted serious problems concerning loneliness, older people being able to maintain themselves, health, and housing services for older people (Power, 1980). The first annual report from

the National Council for the Aged (NCA), published in 1983, defined older age as those aged 60 and over. The NCA committed to publishing a series of reports highlighting the specific needs of older people (NCA, 1983). Over the following years, the NCA (renamed the National Council on Ageing and Older People (NCAOP)) continued to report and represent older people at a statutory level until 2009, when it was subsumed by the Department of Health and Children (Department of Health and Children, 2008).

Although the NCAOP made recommendations and reported to the government, ageing was a low priority for successive governments in light of more pressing concerns relating to the economy, job creation, and emigration. An energy crisis in 1979 caused by the Iranian Revolution disrupted the global oil supply, which saw oil prices rising sharply in 1979 and early 1980 (Downey, 2022). The sharp rise in oil prices pushed the already high inflation rates and increased interest rates to control inflation. Globally, countries experienced "stagflation", reflected by high interest and unemployment rates (van B. Cleveland & Bhagavatula, 1980). Ireland plunged into a recession between 1981 and 1985, resulting in historically high unemployment and emigration rates. There were three changes of government, and it was only towards the end of 1985 that a turning point was reached when a coalition government whose cutbacks dominated economic policies started a recovery (Hogan, 2010).

As the decades progressed, policymakers paid more attention to the needs of the growing cohort of older people. A consultation initiated by the Dept of Health in 2011 on a National Positive Ageing Strategy sought to create a shift in mindset, collectively and individually, on conceptualising ageing and what was needed to promote positive ageing. It highlighted the need to consider older age a phase in life. At a national level, the Strategy sought to emphasise that ageing is not solely a health issue – it requires a complete government response. At an individual level, the Strategy sought to demonstrate that ageing is a lifelong process that does not start at 65 – the choices made when one is young and middle-aged determine how healthy one will be when old. The Strategy promoted positive ageing from birth – how we care for our children, educate our population and provide for a society where all stages of the lifecycle are supported (Dept of Health, Patient Safety First and Healthy Ireland, 2013).

A renewed focus on older people's issues led to the publication of the National Positive Ageing Strategy. It coincided with investment in ageing issues from Atlantic

Philanthropies (AP), a private foundation created in 1982 by Irish-American businessman Chuck Feeney. AP focused its support on health, social, and politically left-leaning public policy causes in Australia, Bermuda, Ireland, South Africa, the United States and Vietnam. In addition to funding several older people's organisations to develop campaigns and strategic plans, it supported and funded research, palliative care, dementia and age-friendly communities and policies (AP, 2021). One was the Ageing Well Network, the forerunner to Age-Friendly Ireland.

**Appendix 2 - Age-Friendly – How it began**

In 2005, Kalache was invited to make a keynote address to the 18th World Congress of the International Association of Gerontology and Geriatrics (IAGG, 2021), a gathering for the global scientific community on ageing held every four years in different locations around the world, attracting an international audience. The IAGG was keen to promote an idea that would excite and energise a domestic and global audience, capture their imagination and engage the media. It provided a perfect opportunity for Kalache to promote the concept that the built environment and complex social relationships they propagated could promote health and well-being as effectively as they could impede them. He set about collecting evidence to support this.

Kalache mobilised his connections in Rio de Janeiro to conduct a pilot study of his neighbourhood of Copacabana, a densely populated beachside residential community and one of the world's oldest. It was a perfect "age laboratory". He set up older persons' focus groups and asked them about their concerns, suggestions, and recommendations to improve their lives. He explored their social connections and support networks and asked them about intergenerational contact with their families. He was particularly struck by meeting the "Girl from Ipanema" (Brown, 2018), who was 17 when she inspired the bossa nova classic and is now a 75-year-old grandmother who still looks after her mother. The evidence-informed a revolutionary concept that explicitly identified a cohesive link between ageing and community – that ageing well was subject to how one lived, access to services, intergenerational contact and social connectedness. It formed the basis of his presentation to the IAGG.

The response scale to Kalache's presentation at the IAGG fired the delegates' imagination. It advanced the idea of a global age-friendly cities project and raised expectations. It became clear that there was a need to build on Copacabana's experiences and develop a more substantial research protocol to apply to the broadest possible range of urban settings. It also highlighted a need for allocated resources to develop the protocol.

Kalache utilised his networks and drew on the WHO's convocation power to persuade the Canadian government to support a commitment to host a meeting of experts from a range of disciples to develop the research protocol and employ a researcher (Dr Louise Plouffe) to lead it. After several months, a three-day meeting was convened in Vancouver to chart the way forward. It comprised policymakers, academics, and civil society from every

region (Canada, Europe, South Africa, Tokyo, and Russia). Combining the foundational concepts of the WHO Active Ageing Policy Framework (WHO, 2002) , the Copacabana pilot study and the collective experience in the room, eight domains were identified that frame the universal experience of ageing in an urban environment – outdoor spaces and buildings; transportation; housing; social participation; respect and social inclusion; civic participation and employment; communication and information; and community support and health services. The resulting Vancouver Protocol (WHO, 2007)outlined a bottom-up, participatory model to empower older urban residents worldwide to evaluate their day-to-day lives` liveability` or age-friendliness. The Vancouver Protocol became the basis for conducting focus group research in 33 collaborating cities of varying size and complexity across the world's regions. The standardised methodology meant data could be quickly collated, comparisons made, and conclusions drawn to inform an age-friendly approach.

Ironically, as Kalache was facing mandatory retirement from the WHO and the future of the WHO programme on ageing was unclear, there were only a few months to write, publish and launch the WHO Age-Friendly Cities Guide. He was determined to release a movement on the world that would quickly gain momentum and become irreversible (Kalache, 2020). In 2007, the Age-Friendly Cities Guide was launched (UN, 2007). Since then, over 1200 cities and communities have officially registered with the WHO. There are many, many hundreds more that are participating informally. In 2019, Ireland became the first country in the world to be recognised by the WHO as Age-Friendly (O'Brien, 2019).

There is no definition or template of age-friendliness, but the WHO's age-friendly approaches are the most distinct and universally recognised instruments. The movement has expanded exponentially (Stafford, 2018). Age-friendliness is now routinely and sometimes casually applied to various design activities, including urban planning, architecture, commerce, health care, education, regulation, services, and products (Fulmer *et al.*, 2020).

**Appendix 3 - Survey Questions**


**Influencing factors and process of becoming and remaining and remaining an Age-Friendly University**


**1. On what continent is your Institution located?**
- Europe
- Asia
- Africa
- North America
- South America
- Australia

**2. What year was it founded?**

**3. How many students attend your institution?**

**4. How long has it been an Age-Friendly University (AFU) ?**
- 1 - 3 years
- 3 - 5 years
- 5 - 11 years

**5. Where is AFU positioned in the Institution?**
- In a School or Faculty?
- In a standalone department?
- In Equality Diversion and Inclusion Unit?   In the President's office?
- Other (please specify)

**6. Is there a dedicated staff member assigned to the AFU?**
- Yes/ No

**7. How many hours of work are allocated to the role?**

|         | 1- 3 | 3- 5 | 5 -8 | 9 - 11 | 12 - 15 | 15 + |
|---------|------|------|------|--------|---------|------|
| Weekly  | ○    | ○    | ○    | ○      | ○       | ○    |
| Monthly | ○    | ○    | ○    | ○      | ○       | ○    |

**8. Is the role allocated to**
- A Dean
- Head of School
- Academic
- Senior Administrator
- Senior Management from the President's office
- Other (please specify)

**9. In what context were the Ten Principles of an Age-Friendly University Interpreted?**

| | Very relevant | Relevant | Somewhat Relevant | Not relevant |
|---|---|---|---|---|
| Equality | ○ | ○ | ○ | ○ |
| Gerontology (Medical) | ○ | ○ | ○ | ○ |
| Gerontolgy (Social) | ○ | ○ | ○ | ○ |
| Humanities | ○ | ○ | ○ | ○ |
| Technology | ○ | ○ | ○ | ○ |
| Health/Wellness | ○ | ○ | ○ | ○ |

**10. Where did you hear about the AFU?**
- Website
- Conferences/Seminars
- Through another membership organisation   Individually promoted
- Other (please specify)

**11. How is the AFU resourced in your institution?**
- It has a dedicated budget
- It is incorporated in existing work programmes
- It is grant aided from external sources
- Iin kind ie existing staff hours are allocated to it
- Other (please specify)

**12. List the factors of influence to becoming an AFU?** (Very Important/ Somewhat Important/ Not Important)
- Strategic Plan
- Institutional Mission/Vision
- Satisfies a Equality, Diversity and Inclusion requirement
- It is part of the Civic Engagement Strategy
- It meets a Corporate Social Responsibility Requirement
- It satisfies the Sustainable Development Goals
- It meets a national policy objective
- It serves a societal need
- To increases age inclusivity on campus
- To promote intergenerational engagement
- To increase research opportunities
- To Increase a mass of ageing expertise in your institution
- To contribute to the national Age- Friendly Cities Programme
- To enhance the public profile of the institution
- To increase opportunities for collaborative research with other institutions on ageing issues
- Other (please specify)

**13. Who did you engage with to advance the AFU?**
- Colleagues in your School/Faculty
- Colleagues across the institution
- Students
- External groups and organisations
-Older people
- Other (please specify)

**14. How did you engage?**
- Convened a working group from your department
- Convened a multidisciplinary working group
- Convened a general meeting comprising multiple stakeholders
- Conducted a survey or focus group internally
- Conducted a survey or focus group externally
- Other (please specify)

**15. Who was responsible for final approval to join the AFU?**
- President/Provost
- Deputy/Vice President
- A member from the Senior Management Team
- Head of School
- Head of Department
- Other (please specify)

**16. How actively are the Ten Principles implemented in your institution?**

1 To encourage the participation of older adults in all the core activities of the university, including educational and research programmes.
2. To promote personal and career development in the second half of life and to support those who wish to pursue "second careers".
3. To recognise the range of educational needs of older adults (from those who were early school-leavers through to those who wish to pursue Master's or PhD qualifications).
4. To promote intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages.
5.To widen access to online educational opportunities for older adults to ensure a diversity of routes to participation.
6. To ensure that the university's research agenda is informed by the needs of an ageing society and to promote public discourse on how higher education can better respond to the varied interests and needs of older adults.
7. To increase the understanding of students of the longevity dividend and the increasing complexity and richness that ageing brings to our society.
8. To enhance access for older adults to the university's range of health and wellness programmes and its arts and cultural activities.
9. To engage actively with the university's own retired community.
10. To ensure regular dialogue with organisations representing the interests of the ageing population.

- The Principles are on the agenda of the most senior staff in the institution and are contributing to policy and strategy
- The Principles are incorporated into existing body work under AFU
- The Principles are not impacting policy or strategy but align with the institutions more positively
- Other (please specify)

**17. Which of the Ten Principles did you implement?**
- Principle 1: To encourage the participation of older adults in all the core activities of the university, including educational and research programmes.

- Principle 2: To promote personal and career development in the second half of life and to support those who wish to pursue "second careers".
- Principle 3: To recognise the range of educational needs of older adults (from those who were early school-leavers through to those who wish to pursue Master's or PhD qualifications).
- Principles 4: To promote intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages.
- Principle 5: To widen access to online educational opportunities for older adults to ensure a diversity of routes to participation.
- Principle 6: To ensure that the university's research agenda is informed by the needs of an ageing society and to promote public discourse on how higher education can better respond to the varied interests and needs of older adults.
- Principle 7: To increase the understanding of students of the longevity dividend and the increasing complexity and richness that ageing brings to our society.
- Principle 8: To enhance access for older adults to the university's range of health and wellness programmes and its arts and cultural activities.
- Principle 9: To engage actively with the university's own retired community.
- Principle 10: To ensure regular dialogue with organisations representing the interests of the ageing population.

**18. To what extent have the Ten Principles been implemented?**

| | Very Actively, the principles are on the agenda of your organisations senior staff | Actively | Passively |
|---|---|---|---|
| They are embedded throughout the institution | ○ | ○ | ○ |
| They are embedded throughout our School/Faculty | ○ | ○ | ○ |

**19. What are the most important Principles in your Institution**? (Please rank in descending order with the most important Principle first)

**20. Do the Principles address all the areas you would like addressed? If not please add your suggestion.**

**21. Are the Principles embedded in your institution as policy? If so Where?**

**22. Are there any procedures outlined in your institution as to how to implement the Ten Principles?**

**23. What challenges did you encounter to become an AFU?**

| | Very Challenging | Somewhat Challenging | Not at all Challenging |
|---|---|---|---|
| Getting information on how to implement the Principles | ○ | ○ | ○ |
| Getting information from other colleagues | ○ | ○ | ○ |
| Getting colleagues involved | ○ | ○ | ○ |
| Getting Senior Management approval | ○ | ○ | ○ |
| Getting responses from the AFU Global Office | ○ | ○ | ○ |

Other (please specify)

**24. What is your vision for AFU membership in the future?**

**25. Should there be a membership charge to join the AFU Global Network?**
- Yes/ No

**Appendix 4 - Case Study Interview Questions**

1. What is your current role at the university, and how does it intersect with the concept of an Age-Friendly University?

2. Were you in this role when the concept of the Age-Friendly university was introduced, and if so, how has it evolved since then?

3. Did you encounter challenges understanding and applying the Age-Friendly principles within your university environment?

4. What were the key factors that influenced your university's decision to become a part of the Age-Friendly University Global Network?

5. Could you describe the process of integrating the 10 Age-Friendly principles? Did you implement them gradually or simultaneously?

6. How did the university's senior management team respond to the idea of becoming an Age-Friendly institution? Was there resistance, or did they embrace it readily?

7. Was significant effort required to persuade your colleagues to support the Age-Friendly initiative?

8. What level of participation have you seen from colleagues and students of the older community within your university since adopting Age-Friendly practices?

9. Is there a specific initiative you would like to discuss that exemplifies the implementation of the Age-Friendly University Principles?

10. Have any aspects of the Age-Friendly university rollout fallen short of expectations or disappointed you?

11. Are there specialized courses offered by your university specifically designed for older adults as part of its Age-Friendly initiatives? Could you provide further details about these courses? Additionally, what other initiatives or activities does your university engage in to demonstrate the principles of Age-Friendly Universities?

12. Would your university be interested in paying for membership in the Age-Friendly Global Network? What level of engagement or benefits would you expect from such membership?

**Appendix 5 - Documents Analysed from McMaster University and the University of Masaryk**

**McMaster University**

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**Appendix 6 - Data Analysis Plan**

**Descriptive Statistics**
1. Freq/% of location of institution
2. Years of being established – convert into numerical data = mean/std.dev, min/max
3. Average student size
4. Freq/% of years of being AFU
5. Freq/% location of AFU – Other has to be analysed qualitatively
6. Freq/% of staff assigned to AFU
7. Freq/% hours of work on a monthly/weekly basis
8. Freq/% role allocation – Other has to be analysed qualitatively
9. Freq/% Question 9 (0001 – 0006) – under what discipline?
10. Freq/% Hear about AFU? – Other – Qual
11. Freq/% resource for AFU? – Other – Qual
12. Freq/% Question 12 (0001 – 0015) – Other Qual (can select multiple)
13. Freq/% Who do you engage with
14. Freq/% How do you engage
15. Question 15 is very important – Freq/% on who gives final approval. Other – Qual
16. Freq/% Active use of principles – Other - Qual
17. Freq/% of principles used
18. Freq% Embedded
19. Freq% of ranking of principles
20. Freq% Challenges – Other – Qual

**Inferential Statistics**
1. Is there a relationship between senior approver vs how well embedded? Chi-Square test
2. Relationship between years of being AFU (ordinal) vs positioned (nominal)? Chi-Square test
3. Relationship between 5 and 12 (15 sub questions) - Chi-Square
4. Association - Question 4 vs 6,8,11, 15, 16 – Chi-Square
5. Number of principles vs how embedded – ANOVA
6. Question 7 vs 16 – Chi Square
7. Question 7 vs 8 – Chi Square
8. Question 11 vs 15 – Chi Square
9. Question 12 vs 13
10. 5 Chi Squares between q1 and 23**10th June 2022**

**Appendix 7 - Research Approval**

Dr. Shivaun O'Brien
School of Policy & Practice

Ms. Christine H. O'Kelly
DCU Age Friendly University

18ᵗʰ January 2021

**REC Reference:**      DCUREC/2020/248

**Proposal Title:**      The Factors and Process of becoming an Age-Friendly University

**Applicant(s):**      Dr. Shivaun O'Brien & Ms. Christine H. O'Kelly

Dear Colleagues,

This research proposal qualifies under our Notification Procedure, as a low risk social research project.    Therefore, the DCU Research Ethics Committee approves this project.

Materials used to recruit participants should state that ethical approval for this project has been obtained from the Dublin City University Research Ethics Committee.

Should substantial modifications to the research protocol be required at a later stage, a further amendment submission should be made to the REC.

Yours sincerely,

*Geraldine Scanlon*

**Dr Geraldine Scanlon**
Chairperson
DCU Research Ethics Committee

DCU
**Research & Innovation**

**Appendix 8 - Codebook Samples**

| id | document | tag | |
|---|---|---|---|
| 3347810 | McM2 | PROCESS | So my current role in the university is I'm project manager at the McMaster Institute for research on aging which is an interdisciplinary research Institute at McMaster, that kind of lives within the whole university, n |
| 3324822 | McM2 | PROCESS | started a year after McMaster had joined, but until that point there hadn't been a lot going on, so I kind of took up the work after we had joined it. |
| 3324823 | McM2 | FACTORS | I did get to kind of make it my own. |
| 3321344 | McM2 | FACTORS | I think our main problem, which is common to so many universities is getting institutional funding to get initiatives going. I find generally our university is quite supportive and interested in activities, but , without central funding it can kind of be difficult to get people on board to use their own funds or time to do things. |
| 3321348 | McM2 | FACTORS | So for the people who are already doing things great. , and also people are happy to align the work they're already doing with the initiative, but to do new things has, will be challenging without money |
| 3321351 | McM2 | PROCESS | changes that have been instituted at the university under the age friendly university since we joined the age friendly university has been the continuation introduction of new social and recreational programs for older adults. |
| 3324825 | McM2 | FACTORS | had a physical activity center, specifically focused on seniors and that's continued to run and became virtual during the pandemic. |
| 3321352 | McM2 | PROCESS | e introduced an intergenerational social program that was initially designed as in person, but went virtual as well during the pandemic. So that's something we got to do. We've built a age friendly university committee, which brings together 42 partners on campus on a semi-regular basis to meet about age friendly initiatives on campus. And we've recently transitioned to a community of practice model, which we found actually produce much better results in getting people to connect. |
| 3321356 | McM2 | PROCESS | And our continuing education center has continued to expand both its in person and virtual offerings for older adults, mostly virtual right now, obviously we continue to expand our programming on campus for older adults and our working with the university to design a space specifically for intergenerational activities. Uh, it's taking a bit of time because building approvals always do in Canada <laugh> mm-hmm <affirmative> and probably everywhere, but it is happening very slowly. And that's been co-designed with input from both students and older adults in an intergenerational co-design sessions. And yeah, so we're working with facility services to overcome some accessibility challenges. |
| 3321361 | McM2 | PROCESS | Our campus is fairly large and parking is all on the outside. So it's a very big challenge for older adults. And we hear about it all the time from everyone about how much it sucks. <laugh> uh, but our facility service is looking to find solutions to that such as, uh, using their golf carts that they have to drive older adults around campus. When we have events and looking at they're looking at designing a program where students would volunteer to do this or be paid to do this, to kind of continue to provide that intergenerational element. |
| 3321361 | McM2 | FACTORS | Our campus is fairly large and parking is all on the outside. So it's a very big challenge for older adults. And we hear about it all the time from everyone about how much it sucks. <laugh> uh, but our facility service is looking to find solutions to that such as, uh, using their golf carts that they have to drive older adults around campus. When we have events and looking at they're looking at designing a program where students would volunteer to do this or be paid to do this, to kind of continue to provide that intergenerational element. |
| 3321357 | McM2 | FACTORS | parking is all on the outside. So it's a very big challenge for older adults. |

| | A | B | C |
|---|---|---|---|
| 1 | Codebook 1 initial stage | | |
| 2 | tag | description | number of highlights |
| 3 | interesting | Further review required | 2 |
| 4 | Role and Responsibity | What role did the champion have | 18 |
| 5 | Challenges | Funding new initatives | 23 |
| 6 | Alignment | to existing work | 17 |
| 7 | Changes because of AFU | New courses | 23 |
| 8 | Challenges for older people | Accessiblity and knowing about what is being offer | 12 |
| 9 | Challenges for staff | understanding the Ten Principles and where they c | 22 |
| 10 | Accountability to older people | Issues about registering for opportunities | 8 |
| 11 | Ownership | Made the role their own | 13 |
| 12 | Existing Offerings | Other things the institution was doing before joinir | 6 |
| 13 | Interpreting the Principles | Finding a way to understand how to operationalise | 13 |
| 14 | Obstacles | External and internal - attitudes and opinions | 5 |
| 15 | Financial barriers | Parking charges | 2 |
| 16 | Breaking down Barriers | Attitudes and making it easier to engage | 15 |
| 17 | Dissemination and Sharing | Information | 2 |
| 18 | Conscious Activities | Things they did to raise the awareness of the Princi | 11 |
| 19 | Covid | Impact of the Pandemic | 2 |
| 20 | Strengths | What were they already doing | 9 |
| 21 | Weakness | challenging stereotypes within the university, gett | 9 |
| 22 | Opportunities | What more could they do, harness existing opportu | 26 |
| 23 | Training | for staff/students and | 2 |
| 24 | Success | how to measure it - what would it look like | 6 |
| 25 | Ambitions | Embedding it throughout the university | 13 |
| 26 | SDG | Important - a way for management to engage and u | 1 |
| 27 | Strategi Plan | Very important - how it aligned helped Senior man | 11 |
| 28 | Education about Ageing | for staff and students | 8 |
| 29 | Intergenerational | absolutely essential - mentoring | 4 |
| 30 | Branding | loved the idea of being branded AFU | 4 |
| 31 | Values Cultural | aligned to national approach in each country | 9 |
| 32 | Support by SMG | Ease of support and navigating politically | 4 |
| 33 | Operationalising the Principles | initially challenging but became easier onve they d | 16 |
| 34 | Collaboration | opportunities multi and inter disciplinery and at an | 23 |
| 35 | Walkability Survey | Very useful and introduced the concept broadly acr | 1 |
| 36 | Students | volunteers/mentors/interest in engaging/ | 1 |
| 37 | Leadership | taking a leadership role and driving it/getting supp | 8 |

codebook +

Ready    Accessibility: Good to go

**Appendix 9 - Visual Journal  Sample**

**Appendix 10 - Additional Information and Initiatives from McMaster Institute on Ageing Research (MIRA)**

**Mc Master Institute on Ageing Research**

MIRA conducts research activities in cross-faculty teams involving older people, their family members, healthcare professionals, and other stakeholders. The objective is to take their input at every research stage, from evaluating situations to implementing suitable initiatives and interventions. Over the years, the input of diverse stakeholders has enabled MIRA to strengthen its expertise and create value in the age-related sector. Through consistent and dedicated efforts, they created and optimised age-centred solutions to promote ageing healthfully, significantly contributing to tackling complex age-related complexities and issues that the older population encounter as they age. The ultimate mission of MIRA is to improve the health status and longevity of the older population by relying on three key elements: research activities, stakeholder collaboration, and education. The research institute has succeeded in upholding the values of excellence, integrity, transparency and interdisciplinary collaboration, which has helped it to bring about positive changes for the older population (McMaster University, 2023).

**Transforming Ageing Through Research**

The McMaster Institute for Research on Ageing (MIRA) is transforming the experiences relating to ageing by focusing on the scientific aspects of ageing. Ageing has been identified as a top priority in research since it impacts every individual who undergoes the normal growth process in life (McMaster University, 2023). MIRA has been working on uncovering and exploring essential and pressing issues that affect the ageing population and influence their life experiences. It supports research that adopts a systems approach to create value for the ageing population, minimise their vulnerability, and maximise them as assets for future generations. Such an approach ensures that older people play a proactive role in the research context and can influence the practices and policies to improve their quality of life and overall wellness.

*Macpage: McMaster Passport to Geriatric Education*

MIRA's unique initiative, Macpage (McMaster Passport for Ageing Education), is an online passport for learners interested in ageing, geriatrics, and elder. This educational tool aims to empower individuals to age healthily by providing a centralized platform for tracking and collecting age-related activities, research, and ongoing work involving older adults. Macpage acts as a "one-stop shop" resource, facilitating communication and sharing of user experiences and learnings.

*Caregiving Essentials Course*

The Caregiving Essentials Course from McMaster University's Continuing Education is an 8-week online program tailored for primary caregivers (McMaster University, 2021). It's structured to enrich caregivers' knowledge and abilities through self-paced learning and online discussions. The course enhances the well-being of older individuals in communities by equipping caregivers with tools to navigate health and community care systems. Core components cover the caregiver role, health basics, support system access, and self-care.

*Summer Program in Ageing (SPA)*

MIRA partnered with the CIHR Institute of Ageing to host the 2021 CIHR Institute of Ageing Summer Program in Ageing, held virtually from May 02 to May 12. Learners, including graduate students and postgraduate fellows across Canada and abroad, participated in collaboratively developed advanced training. The program featured renowned guest speakers, and participants engaged in robust weekly networking events (McMaster Institute for Research on Ageing, 2021)

*Storytelling Project*

McMaster University initiated the "Niagara Stories Project," using storytelling to build connections and combat loneliness among seniors. Through sharing life stories on a digital platform, seniors engage in intergenerational interaction with student volunteers. The project addresses the serious issue of loneliness among older adults and provides opportunities to acquire new skills applicable to real-life settings. It also collaborates with

Reading Lab researchers to inform various research projects on loneliness and isolation (Laux, 2022).

**Labarge Center for Mobility in Ageing**

The Labarge Center for Mobility in Ageing came into existence in 2016. Its main objective was to amplify and facilitate research initiatives to mitigate reduced mobility risk and consequences during old age (https://mira.mcmaster.ca/research/research-centre/centre-for-mobility, 2021). The centre builds on the work of MIRA. It is known to foster interdisciplinary approaches to research varying aspects of mobility in ageing, such as physiological and biological factors, biomedical, technological and clinical innovations, cognitive, behavioural, and psychosocial contributors, environmental factors and the availability of prevention, rehabilitation along with management strategies relating to mobility challenges. Ageing increases the risk of developing co-morbidities and health complications. MIRA's focus on mobility has been a primary concern as it can adversely impact individuals' economic and social independence (https://mira.mcmaster.ca/research/research-centre/centre-for-mobility, 2021). In addition to mobility, the centre also emphasises the psychological and physical health aspects of remaining active as one ages to interact at an integrated level. Some key elements that make up the research approach include stakeholder consultations and community engagement, major interdisciplinary research initiatives, synthesis and scoping research reviews, and catalyst grants.

**The partnership between MIRA and Canada's Global Nexus for Pandemics and Biological Threats**

MIRA partnered with Canada's Global Nexus for Pandemics and Biological Threats to coordinate a collaboration engageing the research community where experts could share their insights on how the ageing population could prepare to fight against emerging infectious diseases. During the in-person knowledge exchange event, experts from diverse fields interacted and shared their insights on mobility, mental health, vaccination, social isolation, immunity, and infectious diseases (MIRA hosts an interdisciplinary symposium exploring ageing communities and infectious disease Home, 2022). It conducts annual Knowledge Exchange events to facilitate researchers in the ageing arena to connect, share

and discuss ideas and establish new collaborations with one another (www.cubiclefugitive.com, 2022b).

MIRA has partnered with Nexus to add new perspectives from infectious disease research activities to collaborate and strengthen the comprehensive nature of the ageing research at McMaster University. These partnership initiatives create an opportunity for diverse stakeholders, including researchers, trainees and experts, to come together, share ideas and connect deeper (www.cubiclefugitive.com, 2022b)


**The Embolden Trial**

The Embolden Trial (also known as 'Enhancing physical and community mobility in older adults with health inequalities using community co-design) is a project effectively addressing the mobility concerns of older people. Reduced physical activity (PA) and the ability to conduct activities relating to daily life are some of the common areas of concern as people grow old. It can increase an individual's vulnerability and impact their quality of life by increasing the frequency of hospitalisations and premature deaths.

The project brings together two "dream teams" for significant research projects with a co-design research approach involving the engagement of target populations and research stakeholders to ensure the better alignment of research with the pre-existing community programs. The role of the interdisciplinary team is vital since it draws expertise from various academic units and faculties to extend help and support to community-based older adults. The objective is to make the optimum utilisation of the existing assets and capabilities available in the community setting to ensure appropriate support for older people to lead healthy and independent lives. The team behind the Embolden Trial will implement and evaluate innovative community interventions to promote and boost physical and community mobility, social participation, and system navigation. The project significantly contributes to the ageing arena as it ensures that a robust foundation is established to facilitate partnerships, along with the achievement of proposed objectives to address the mobility concerns of the older population. (www.cubiclefugitive.com, 2018)


**Interdisciplinary Fellowship Grants**

MIRA ensures that a broad range of opportunities are provided to diverse community members so they can make valuable contributions to the ageing sector. Interdisciplinary Fellowship Grants support teams of MIRA researchers to propose new projects to attract highly qualified postgraduate fellows. Such projects can allow them to carry out

collaborative and interdisciplinary research that emphasises the ageing process. In 2021, MIRA was involved in several practical projects: 'The Digital Empowerment of Vulnerable Senior Living,'; 'Unraveling the Mechanisms Contributing to the Anti-Ageing Effects of Metformin,'; and 'Does Exercise Enhance Synaptic Plasticity in Individuals with Mild Cognitive Impairment and Ageing?' These types of projects have played an instrumental role in strengthening the contribution of McMaster University's Institute for Research in the ageing sector (www.cubiclefugitive.com, 2018)

MIRA – iGEN (also known as the McMaster Institute for Research on Ageing Intergenerational Study) is researching the effect of the COVID-19 pandemic on older people. In a collaborative partnership with Dixon Hall, the research explores the interlink between generations and the impact on health. For example, during COVID-19, many older people could not visit their family members and experienced social, psychological, and health issues due to restrictions. Furthermore, individuals without children or grandchildren also experienced challenging situations relating to social isolation. An element of the research study has revealed a vital connection on how multigenerational engagements positively impact ageing (www.cubiclefugitive.com, 2022). Another aspect of the research study identifies opportunities and assists in developing programs to improve the quality of life and promote healthy ageing. In order to progress towards the research objective, it is critical to understand the reasons that lead to the difference in health and medical conditions in diverse economic and social groups as they grow old. Other existing research suggests that diverse factors like environmental, biological, psychosocial, lifestyle and behavioural are shared between varying generations of families. The opportunity created through the study can help investigate ageing and health across families to identify critical factors impacting health, mobility, psychological wellness and social participation (www.cubiclefugitive.com, 2022)

**The strategy adopted by MIRA – Design Thinking**

The Institute for Research on Ageing adopts a design thinking approach. Design thinking can be defined as a formal methodology relating to solution-focused thinking. Instead of working to address a specific problem or issue, the design thinking approach begins with a goal and explores a broad range of alternative solutions concurrently. This method is beneficial since it helps inform comprehensive investigations of ill-defined problems involving several unknown variables. Such a strategic approach enables MIRA to integrate

the end-users into the project context, which helps to make sure that their points of view are considered (www.cubiclefugitive.com, 2022a)

While working on diverse projects and research programs relating to the age sector, MIRA supports the application of design thinking to shift from a problem-focused approach that researchers typically adopt. The solution-focused approach that MIRA adopts ensures that high emphasis is laid on users at the very first step. After focusing on users, the researchers or designers can start the process by defining the problem and probable solutions that can be adopted to address the same. The rationale for adopting the strategic design thinking approach by MIRA is to ensure that a robust framework enables researchers to work collaboratively to solve ageing-related issues and complexities in the real-life setting (Design thinking- rationale. Design Thinking- Rationale, 2021). The design thinking approach is practical since it ensures that people from diverse specialisations and domains come together to form interdisciplinary teams and foster innovative research to create value for older adults and other stakeholders.

**Appendix 11 - Additional Information  U3A programme at  Masaryk University**

**Online Lectures**

During the COVID-19 pandemic, the university transitioned lectures online, offering them via a YouTube channel accessible to students. These lectures covered various fields, including astronomy, art history, economics, history, and literature, broadcasting to U3A listeners at scheduled times (Vidovićová, 2022).

Additionally, thematic semester-long online courses were provided to students affected by cancellations of face-to-face courses. Examples include courses like "In the Footsteps of Important Civilisations and Cultures of Latin America," "Memory Training," and "Secrets Hidden in DNA," where participants engaged in real-time discussions with lecturers via video transmission. Online or pre-recorded lectures have now become part of the U3A study offerings alongside traditional face-to-face teaching (Masaryk University, 2021a).

Moreover, employees and students from the Faculty of Sports Studies at MU created exercise videos for the public as part of the "Move with FSpS" project. They developed a website offering exercises suitable for beginners, advanced recreational athletes, families with children, older individuals, and those with health restrictions (Masaryk University, 2020).

The Department of Lifelong Education of MUNI regularly organises conferences dedicated to implementing senior education and the broadest possible spectrum of views on the current life of older people. Influential geriatrics, sociology, pedagogy, and psychology experts regularly contribute and participate. The conferences are organised in cooperation with the Association of U3A of the Czech Republic, the Senate of the Czech Republic, the Regional Office of the South Moravian Region, the Municipality of Brno, and other important institutions.

**Long-term courses**

The long-term courses offered by U3A are typically three-year courses specifically designed for students who have already reached their retirement age. Older people who have completed their secondary education and taken part in school leaving examinations can enrol (Masaryk University, 2021). The most popular long-term courses students can avail of are

the general humanities courses. Apart from three-year courses, there are also one-year courses, such as "Cultural Heritage and Historical Preservation in Moravia" (Masaryk University, 2021a), delivered in partnership with the U3A and the Moravia Museum.

**Short-term courses**

The short-term courses offered at U3A have a thematic focus. Older adults are offered the opportunity to learn foreign languages, physical relaxation activities, and technology skills. Some courses integrated into this area are offered to the general older public. The courses are designed to empower older people to get access to information. The physical education course is an example which empowers older adults to lead active and healthier lives, which contributes to the healthy ageing process (Masaryk University, 2021a).

**Language courses**

These enable learners to improve their skills in new languages such as English, French, or German. One of the advantages of the course is that it is customised for older people (Masaryk University, 2021).

**Special lectures**

Special lectures are also offered to older adults in various areas, such as politics, innovative scientists, and famous artists. These contribute to the university's core activities (i.e., teaching, learning, and research) and provide social opportunities (Masaryk University, 2021).

**Course Design**

The courses that U3A have designed ensure that older adults can have flexible learning experiences. The course elements and duration are designed so the students can choose their area of interest to continue their learning process. These opportunities reflect their approach to the Ten Principles and add additional value and dimension to their activities (Masaryk University, 2021)

**Appendix 12 - Policy Implications and Impact of the Ten Principles on Higher Education**

The Ten Principles of an Age-Friendly University (AFU) present substantial policy implications that can transform higher education. Research underscores the importance of aligning institutional policies with these principles to achieve long-term strategic goals and contribute to societal progress.

|  | **Policy Implications** | **Transformative Impact:** |
|---|---|---|
| **Addressing Societal Needs** | **Community Engagement Programs**<br><br>Develop and fund initiatives that engage with local communities to address social issues such as health disparities, ageing populations, and education gaps.<br><br>**Social Responsibility**<br>Universities become key players in addressing societal problems, enhancing their role as community leaders. | **Research Initiatives**<br><br>Promote research targeting societal challenges, encouraging faculty and students to focus on projects with tangible social impact.<br><br><br>**Enhanced Reputation**:<br>Institutions gain recognition for their societal contributions, attracting students and faculty committed to making a difference |
| **Promoting Inclusivity** | **Admissions and Recruitment**<br><br>Implement inclusive admission policies to ensure diversity in the student body, including older adults and underrepresented groups.<br><br>**Support Services**<br><br>Provide comprehensive support services, such as counselling, career advice, and accessibility resources, tailored to diverse student needs | **Diverse Learning Environment**<br><br>A more diverse student body enriches the learning experience with varied perspectives and life experiences.<br><br>**Equity in Education**:<br><br>Enhanced access to education fosters a more equitable and just society. |

|  | **Policy Implications** | **Transformative Impact:** |
| --- | --- | --- |
| **Embracing Digital Transformation** | **Infrastructure Investment**:<br><br>Invest in cutting-edge digital infrastructure and technologies to enhance teaching, learning, and administration.<br><br>**Online Learning**:<br><br>Expand online learning opportunities, including hybrid and fully online programs, to cater to a broader audience | **Increased Accessibility**:<br><br>Education becomes accessible to a wider range of students, including those in remote areas or with time constraints.<br><br>**Efficiency and Innovation**:<br><br>Digital tools streamline administrative processes and support innovative teaching methods |
| **Supporting Lifelong Learning** | **Continuing Education Programs**:<br><br>Develop robust continuing education and professional development programs catering to learners of all ages.<br><br>**Flexible Learning Paths**<br>Offer flexible learning paths, including micro-credentials and certificates, to support ongoing skill development | **Workforce Development**:<br><br>A continuous learning culture enhances workforce adaptability and skills, driving economic growth<br><br>**Empowered Learners**: Individuals are empowered to pursue lifelong learning, staying relevant in a rapidly changing world |
| **Creating Age-Inclusive Environments** | **Campus Design**:<br><br>Design age-friendly campuses with accessible facilities and amenities for older students and staff.<br><br>**Age-Inclusive Programs**:<br><br>Develop programs and activities that encourage participation from individuals of all ages. | **Intergenerational Interaction**:<br><br>Fostering interactions between different age groups enriches the educational experience.<br><br>I**nclusivity**:<br><br>Universities become more inclusive spaces, reflecting broader societal diversity. |
| **Promoting Health and Well-Being** | **Health Services**:<br><br>Provide comprehensive health services and wellness programs catering to the needs of all age groups<br><br>**Mental Health Support**:<br><br>Enhance mental health support services, recognising the diverse | **Well-Rounded Education**<br><br>Supporting health and well-being contributes to a well-rounded education, ensuring students and staff thrive.<br><br>**Productivity and Retention**:<br>Healthy and well-supported students and staff are more |

| | | |
|---|---|---|
| | challenges faced by different age demographics | productive and likely to remain at the institution |
| **Encouraging Civic Engagement** | **Civic Education**:<br><br> Integrate civic education and ageing research into the curriculum, encouraging students to engage with societal and political issues.<br><br>**Volunteer Opportunities**:<br><br>Provide ample opportunities for students to engage in volunteer work and community service | **Active Citizenship**:<br><br> Students become active, informed citizens committed to contributing to society and informing ther own ageing.<br><br>**Community Impact**:<br><br>Universities strengthen their ties with the community, fostering mutual growth and support |
| **Advancing Sustainable Practices** | **Sustainable Operations**:<br><br>Implement sustainable practices in campus operations, from energy use to waste management<br><br>**Curriculum Integration**:<br><br>Integrate sustainability into the curriculum across all disciplines, emphasising its importance. | **Environmental Stewardship**<br><br> Universities become leaders in environmental stewardship, modelling sustainable practices.<br><br>**Sustainability Education**:<br><br>Graduates have the knowledge and skills to address environmental challenges. |
| **Ensuring Institutional Flexibility and Innovation** | **Governance Structures**:<br><br>Adopt flexible governance structures that allow for rapid adaptation to changing educational needs.<br><br>**Stakeholder Involvement**:<br><br>Involve diverse stakeholders (including students, faculty, community and industry partners) in decision-making processes. | **Agility**:<br><br>Institutions become more agile and respond quickly to new challenges and opportunities.<br><br>**Collaborative Culture**:<br><br>A culture of collaboration and innovation enhances the institution's ability to evolve and thrive. |