



# *Designs for Change:* Libraries and Productive Aging

**Report on the National Library Leaders Forum**

Co-Sponsored by  
Americans for Libraries Council  
and  
Institute of Museum and Library Services

Washington, DC

September 26-27, 2005



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## **Executive Summary**

### **Designs for Change: Libraries and Productive Aging**

Public libraries are uniquely placed to help mediate the great social transformation signaled by the growing proportion of healthy, active older Americans. Recent research documents the desire of older Americans to remain engaged in the broader world and to continue their learning opportunities. These adults are resources for our communities and our libraries – if librarians can transform their practices and their institutions to provide opportunities and connections to support lifelong learning and civic participation.

On September 26-27, 2005, Americans for Libraries Council (ALC) and the Institute of Museum and Library Services (IMLS) convened a Library Leaders Forum, *Designs for Change: Libraries and Productive Aging*, to examine key issues relating to the aging opportunity. The meeting was held as part of ALC's Lifelong Access Libraries initiative, which seeks to foster fundamental changes in how librarians provide services and opportunities to active older adults. The initiative is supported by a major grant from The Atlantic Philanthropies; the Library Leaders Forum received additional support from the Institute of Museum and Library Services and Americans for Libraries Council.

More than 50 participants representing a variety of fields, including libraries and information services, met in Washington, DC, to review current research on the “baby boomer” generation; learn about instructive examples of professional change in other fields; examine emerging models of library services to active older adults; identify partnerships and professional development options; and discuss strategies for professional and institutional change.

The presentations offered a variety of perspectives and set the stage for discussions that identified key findings and provided the basis for a call to action. The key findings include recognition that the current paradigm of library services for “seniors” does not match the characteristics and potential contributions of the baby boomer generation; that the profession is not organized to support coordinated change; that there is no central, easily accessible database of best practices; and that the challenges and opportunities of demographic change must be shared across sectors, fields, and disciplines.

The call to action emphasizes a need for leadership to bring about change at all levels of the library community. It also highlights the importance of finding new approaches to services and defining benchmarks and frameworks for their dissemination. It urges creation of a community of practice concerned with services to older adults and stresses the importance of working across disciplines to reposition library practice.

Participants from a variety of library organizations agreed on the importance of continuing the discussion after the Forum. Americans for Libraries Council and the Institute of Museum and Library Services have offered to coordinate the dialogue and support action that helps libraries work with older adults to realize the aging opportunity.

## Call to Action

- **Leadership is needed at all levels of the library community to effect change.** As libraries undergo the changes required to help realize the aging opportunity, library educators, state librarians, association leaders, system directors, and continuing education specialists must coordinate their efforts to advance change.
- **Librarians need new approaches to services for adults, and benchmarks and frameworks to enable their dissemination.** These approaches must engage older adults in program design, link them to work and service opportunities, encourage creative expression, and promote exchange across generations. They should also foster partnerships with museums and other cultural, educational, and service organizations.
- **Librarians must build a community of practice about services to older adults.** Members of the profession at all levels can benefit from exchanging information about issues, best practices, and new services. Electronic networking could be the backbone of such a community.
- **Librarians need to work with other disciplines to reposition library practice.** Collaboration with other professions and disciplines would enable librarians to gain insight into the change process and to create more effective services and opportunities for older adults.
- **Library leaders at all levels should encourage dialogue with local organizations and other partners.** Many local and national organizations are poised to work closely with public libraries on a range of common interests related to the aging opportunity.



## Introduction

Public libraries are uniquely placed to help mediate the great social transformation signaled by the growing proportion of healthy, active older Americans. Recent research documents the desire of these older Americans to remain engaged in the broader world, to continue their learning opportunities, and to find fulfillment in meaningful activity.

On September 26-27, 2005, Americans for Libraries Council (ALC) and the Institute for Museum and Library Services (IMLS) convened a Library Leaders Forum, *Designs for Change: Libraries and Productive Aging*, to examine key issues relating to the aging opportunity. The meeting was held as part of ALC's Lifelong Access Libraries initiative, which seeks to foster fundamental changes in how librarians provide services and opportunities to active older adults. The initiative is supported by a major grant from The Atlantic Philanthropies; the Library Leaders Forum received additional support from IMLS and ALC.

More than 50 participants representing key facets of librarianship as well as leaders from other professions met in Washington, DC, to share and discuss perspectives on the aging opportunity. Participants reviewed current research on the "baby boomer" generation; heard about instructive examples of professional change in other fields; examined emerging models of library services to active older adults; identified partnerships and professional development options; and discussed strategies for professional and institutional change.

The forum was organized around five topics:

- What do we know about baby-boomers?
- What is the aging opportunity, and how are other professions responding?
- What are current library services for active adults, including emerging models and partnerships?
- What is the status of library education and professional development about preparing librarians to work with active older adults?
- What will it take to prepare the library profession for the aging opportunity?

The presentations offered an array of perspectives and set the stage for discussions that identified key findings and recommendations for action. Participants from across the library field stressed the need to continue to work together to promote change. ALC and IMLS will work with library leaders to continue the dialogue, promote education, and support action that helps libraries work with older adults to realize the aging opportunity.

## **Key Findings**

- **The public library is exceptionally well-positioned to help realize the aging opportunity.** As a source of information, ideas, and community connections the library has inherent qualities that make it a powerful asset for older adult learning and community engagement.
- **Demographics offer a challenge and an opportunity.** A new generation of active older adults poses new issues for library service and the role of the library while opening up possibilities for harnessing the energy and experience of older Americans for the benefit of their communities.
- **Libraries are poised to develop services that match the characteristics and potential contributions of the baby boomer generation.** Current services for adults can be tailored specifically to apply to the large number of vigorous Americans who are now reaching the traditional retirement age and preparing for the next third of their lifespan.
- **Targeted services for active older adults imply the need for clear competencies and training.** Library school curricula must reflect demographic and social realities, such as the need for service competencies for information and learning needs across the adult lifespan.
- **Development of new approaches to adult services will require coordinated change across the profession.** Change will happen more rapidly and smoothly if educators, practitioners, researchers, and others work together to exchange services and integrate new service trends.
- **The profession would benefit from an easily accessible database of best practices.** Librarians would benefit from instructive examples of peers working in new ways with older adults.
- **The challenges and opportunities must be shared across fields and disciplines.** Librarians can benefit from greater exposure to new research on mid-life and older adults and new training in other professions such as social work and gerontology.
- **Baby boomers and other older adults raise issues that transcend the library profession and require working closely with other organizations and experts.** Collaboration with other educational and service organizations is essential to build communities that support productive aging.

## The Forum

The real challenge is to provide a national framework for systemic change.

– *Marsha Semmel, Institute of Museum and Library Services*

I came away [from the forum] believing that there are two main paths for libraries to pursue. One is to become a place that addresses “needs,” typically for information. . . . The other is to become a place that speaks to the creativity in the individual – which involves programs that take a theme that grows out of a book or a set of books [or ] perhaps brings together people with a common subject interest who then map out activities or a “course of study.”

– *Mara Mayor, Humanities Consultant*

### Opening Remarks

*Mary Chute, Acting Director of the Institute of Museum and Library Services*, welcomed participants to the meeting. “Today we are here to talk about change,” she began. Much of what IMLS does is “to help cultural institutions navigate change. We are a federal agency that is a laboratory of ideas,” seeking to be “a catalyst for innovation and a launching pad for new standards and best practice” – “aspirations we share with the Americans for Libraries Council.”

The agency’s mission, she noted, is to create and sustain a nation of learners. Libraries and museums should be leaders in fostering vibrant learning communities, with learning defined broadly to embrace “what we do to make sense of the world.” Such learning occurs at school but also out of school, and it includes everyone, especially the great number and diversity of adults who are approaching traditional retirement age, whether or not they are actually retiring. Time spent now, “planning and thinking strategically about how to engage with active productive older adults,” is a necessary investment for the continued vitality of our communities and our institutions.

Chute identified four interwoven themes to help define a discussion about how libraries and museums contribute to the ideal of a nation of learners and to productive aging.

- First, they engage seniors in their family and in community groups. They promote interaction between the generations and spur learning and literacy development through the senior years.
- Second, they help sustain cultural heritage and connect people to ideas. The collections in libraries and museums connect people to the full spectrum of human experience.

- Third, libraries and museums help build 21<sup>st</sup>-century skills. Success in today's society requires information literacy, a spirit of self-reliance, and the ability to collaborate and communicate effectively and to solve problems. These are required skills beyond the college years; as they age, increasing numbers of adults will continue to work or volunteer in new settings that require technological literacy, teamwork, and the ability to master new content and work practices.

Finally, libraries and museums provide opportunities for civic participation. They offer safe and trusted forums for communities to address such issues as workforce needs, parenting (and grandparenting) concerns, cross-cultural understanding, and even *productive aging* itself.

IMLS has brought staff to listen, learn, network, and help to build a community of practice around libraries and productive aging that will make a difference in the coming months and years.

*Diantha Schull, President of Americans for Libraries Council*, opened the Forum by asking if the library profession is prepared for the coming baby-boomer generation, a generation that constitutes a new phase of human life. Baby boomers, she noted, will not fit the current paradigm for the elderly, but will be healthier and more socially and civically active than older adults have ever been. A primary goal of the Library Leaders Forum is to examine the implications of this new demographic for library services. Schull asked if libraries should continue to categorize all older adults as "seniors" and continue to assume that they are all dependent, infirm, and isolated. Could they, rather, seize this opportunity to position themselves as focal points for older adults seeking options for learning and service, and opportunities for community connections?

Schull emphasized the need for key individuals and organizations across the library profession to provide leadership with respect to professional and institutional change. She noted that co-sponsorship of the Forum by IMLS reflects the significance of the issue for the future of libraries and indeed the future of cultural institutions in general. Participation by leaders from complementary professions such as social work and gerontology is an indication of libraries' potential value in helping to advance healthy and productive aging.

Schull described the Forum as a key component of ALC's Lifelong Access Libraries initiative, launched with major support from The Atlantic Philanthropies. Growing out of experimental and developmental work in Arizona and Connecticut, the initiative seeks to strengthen libraries as centers for lifelong learning and civic engagement for active, older adults. The initiative is based on six assumptions:

- Systemic change can be accelerated through many simultaneous interventions.
- Public libraries by their nature are key players in promoting productive aging.
- The current paradigm for senior services is no longer appropriate.
- An interdisciplinary perspective is necessary.
- Both local and national change are needed.
- Public libraries are uniquely equipped to make options equally available to all.

“We saw the need to go beyond local change, moving to systemic change,” said Schull. “We believe this initiative can provoke fundamental change in community librarianship.” After emphasizing the importance of learning for active older adults, she acknowledged IMLS as a leader in promoting awareness of a continuous, lifelong learning environment and the special roles that libraries and museums can play in it. While rethinking older-adult services, “we can draw on new understanding that learning continues and may in some ways deepen in the third age. Libraries have special roles to play in ensuring that all older adults have learning and service opportunities in their third age.”

*Gloria Coles, Director of Lifelong Access Libraries*, characterized the forum’s aim as offering library leaders an opportunity to reflect upon the special role of libraries as “first responders” for the new older adults. She stressed that the Forum, and the larger Lifelong Access Libraries initiative of which it is a part, were intended to help libraries better serve older adults and contribute to an increased quality of life. To be successful, she argued, library leaders must not only embrace but model and support change. Coles described the five tightly-linked strategies that Lifelong Access Libraries employs for bringing about this change.

- First, to inform library leaders by convening and engaging them in a dialogue about the characteristics and potential contributions of active older adults and what they imply for the profession. The intent is to stimulate interest and investment in change across the field.
- Second, to begin reshaping the nature of adult services by developing and disseminating Lifelong Access Libraries, a service framework that focuses on midlife and active older adults. ALC has developed Lifelong Access Libraries through experimental and laboratory projects in Arizona, Massachusetts, and Connecticut carried out in partnership with state libraries and library directors. Lifelong Access Libraries is now being implemented through professional development activities in New York, Pennsylvania, and Massachusetts. The approach has begun to change the nature of adult and “senior” services in libraries and offers an instructive example for other training efforts.

- Third, to engage a cadre of mid-career professionals from around the country in an intensive training at an annual Lifelong Access Libraries Institute that will be conducted in the summers of 2006, 07, and 08. Librarians will be trained and groomed as leaders about older-adult issues and their relationship to the library. Librarians selected for the Institute will be known as Lifelong Access Fellows. They will be the vanguard of librarians, returning to their libraries and creating programs and services and sharing ideas with others involved in making public libraries centers for vital aging.
- Fourth, to develop Centers of Excellence and Innovation as demonstration sites. In Year 1 of the Lifelong Access Libraries initiative, ALC identified three Lifelong Access Centers of Excellence:
  - Phoenix (AZ) Public Library
  - New Haven (CT) Free Public Library
  - Allegheny County (PA) Public Library Association

In addition to demonstrating best practices across a wide spectrum of programs and services for midlife adults, these libraries will house trainings and provide facilities for ongoing research and experimentation. Profiles of each site can be found at [www.lifelonglibraries.org](http://www.lifelonglibraries.org). At least two additional Centers of Excellence will be identified in 2006, year 2 of the Lifelong Access Libraries initiative.

- Fifth, to create an online knowledge center where ideas and practices can be shared with other Fellows, with Institute faculty, and with the growing community of librarians who have been involved in the Lifelong Access Libraries initiative. The Lifelong Access Libraries site, launched early in 2006, offers profiles of a range of best practice sites. The “Innovations Inventory,” in particular, offers a glimpse of emerging programs and services at libraries nationwide. Please visit the inventory at [www.lifelonglibraries.org](http://www.lifelonglibraries.org).

Coles encouraged Forum participants to take a broad perspective about aging and its implications for the library profession, and concluded her remarks with several questions: “How can you communicate your excitement about the aging opportunity to other members of the library community and to decision makers at all levels? How can you help advance innovative services and programs for the baby boomers and new older adults? What form will your leadership for change take in the next year?”

## Major Themes

### 1. Leadership

It would be insane to offer the same solutions for today's challenges and opportunities as yesterday's.

*–Eugenie Prime*

We need to involve younger professionals in this movement, train new leaders in aging issues.

*–Audra Caplan*

We must look at sending people back into libraries to renew skills and education. Libraries, schools, and museums are no longer restricted to the confines of their walls. They can bring forums, lifelong learning, culture, education into peoples' homes.

*–Lawrence Grossman*

Libraries have the potential to facilitate the process of reimagining and revising what it means to be an older person in our society. As trusted and geographically-accessible community conveners, offering places for discussion and experimentation about basic issues of aging that remain unresolved or lack clear definition, libraries have the opportunity to contribute to the emerging national debate about the value and importance of the older adult population. Libraries have the advantage of being virtually available, offering resources for remote access for patrons with limited mobility or simply a desire to connect from afar. Online or in person, libraries welcome and make space for diverse voices. They are the places Americans often go to first for information about the science of aging, health information and options, and work and volunteer opportunities.

Reaching new visions of aging goes beyond discussion and extends to fundamental institutional change. Such change does not happen by chance, however. It requires leadership and the willingness to take risks. Change leaders must create a sense of urgency and define a compelling vision. They must communicate that vision through continuous repetition, support for experimentation, and application of new frameworks for practice, as Eugenie Prime emphasized.

Institutional change comes from all levels:

- Innovation can come from the top down and bottom up. It can spring from library school faculty, or it can come from the local level and gain national attention. Communities and individual libraries are demonstrating

considerable initiative in devising model programs and effective solutions to local problems.

- There is still the need to develop national support and infrastructure. Even the best local efforts will benefit from a broader national context of thinking and discourse.
- Library trustees are critical to change. They represent an important local root of the library. It is crucial to find ways of involving them in the change process.
- Library leaders need to make a compelling case for change and to institutionalize an attitude in support of change. This requires honing clear and compelling messages and finding ways to infuse them into the library community's corporate culture.
- Institutional change requires that leaders act differently both inside and outside the profession. Inside, they must coordinate across the various sectors of the library world: library educators, state librarians, and others must overcome the current fragmentation of efforts. They should look at other kinds of libraries and cultural institutions for models and for partnerships – the sphere of discussion shouldn't stop at the public library. Outside, they must make connections with other fields and disciplines. To do things differently, they need to “adopt an outsider's intellectual objectivity” and work in a multidisciplinary perspective.



## **Creating Transformative Organizations**

*Eugenie Prime, former Director, Hewlett Packard Corporate Libraries*

In the meeting's opening presentation, **Eugenie Prime** identified the key levers for making transformative organizations, by which she meant organizations capable of continual self-renewal. The goal is to establish an environment where change is ongoing, not episodic.

For systemic change the first need is to create a sense of urgency. Only urgency will overcome the barriers to change. "You have to have the sense of urgency," she warned, "because if you haven't got it, you can't fake it."

The next step is to draw a compelling vision, a seductive vision. That is vital for showing the direction in which the organization is to move and the strategies for doing so. When people resist change, vision is what will compel them to do things differently. A compelling vision is very simple and straightforward; it brings people together and gives meaning to mundane tasks. If you have to define and explain and clarify it, it is not the right vision: go back to the drawing board.

To do things differently, we must learn to see things differently. Seeing differently means learning to question those concepts and lenses through which we view and frame the world, our competencies, and our business models.

We must communicate the vision through continuous repetition in many media, in a way that enables people to see it right away. Maintain clarity of direction: who we are, where we are going, and why. Participants at this forum have the opportunity to reestablish the library's position as a major element of lifelong learning. This requires explaining clearly to people why the library is so necessary to learning – "why Google is not enough."

Take risks! Nothing will ever be attempted if all possible objections must first be overcome. As T.S. Eliot put it, "You will never know how far you can go unless you are willing to go too far."

## **Looking at Systemic Change in a Related Field: Social Work**

Linda Harootyan, Gerontological Society of America

**Linda Harootyan** described an important initiative in the field of social work that provides an instructive example of a process that is resulting in systematic professional change in services to an older population. Funding from the John A. Hartford Foundation has supported a multiyear effort, begun in 1998, aimed at refashioning how aging knowledge and skills are valued by the social work profession. The Gerontological Society of America (GSA) is coordinating this effort.

Social workers, like librarians, have virtually no education in terms of aging. The initiative seeks to transform social work education and the stereotype of aging, through a sustained, long-term commitment of resources. The main strategies are to create a compelling vision, create a sense of urgency, cultivate leaders in the social work field, develop new training models that expose students to experiences in the aging field, and infuse aging into social work curricula. Through short, simple messages, a vision has been communicated to the profession, often through key leaders whose voices carry weight and influence.

Since publication of the project's "Blueprint for the New Millennium," in March 2001, signs of change have begun to appear:

- There are notably more graduate and undergraduate courses addressing aging in schools and universities.
- There is more material on aging included in curricula.
- Skills in aging are being considered as a qualification for accreditation.
- Faculty have more expertise in aging.
- Doctoral students are more interested in aging.
- More students are participating at field demonstration sites, and there are more placements following graduation.

Most significantly, the National Association of Social Work, which previously had shown no interest in geriatrics, now has a geriatrics leadership group in Washington, DC.

## ***2. Models and Best Practices***

Let's look at the models that work. Look at the Family Place program of Middle Country Public Library as one example. Our librarians come back from Family Place training workshops with all kinds of exciting new ideas. I'd love to have places to send staff for training in working with older adults.

*–Norman Maas*

Libraries have the potential to make the process of re-imagining, revision, consciousness-raising possible. People need to rethink what they can become."

*- Mary Catherine Bateson*

Librarians need models of how to provide services to—and with—older adults who are seeking to continue learning and remaining engaged in the world. This requires familiarity with current thinking about longevity, the aging process, and the characteristics of midlife adults. Librarians need help in translating that basic information and insight into specific services.

New services to older adults have to be welcoming, attractive, and accessible, but above all they must imagine older adults in ways that respect their vitality and desire to learn, grow, and stretch their vision of themselves. Community services should reflect the new understanding of active older adults. They should enable libraries to fill voids not well met by senior centers; make the library the kind of place where midlife adults would like to be; and promote intergenerational connections that foster engagement in the whole community.

Working with baby boomers involves new approaches to community librarianship. Baby boomers and others have their own ideas. It is necessary to find ways of empowering them to define services and programs. Further, to attract baby boomers, programs must be marketed in new ways, such as by subject rather than by target audience. For example, we need to begin talking about travel for people who have the time to travel, not travel for older adults or other age groups. Librarians can take more of a facilitation role: You have an idea, we have a place. Baby boomers are looking for information and options. Libraries, as providers of community information, can link boomers to local opportunities for work and services.

Libraries need to develop new structures for identifying and mobilizing people with time and commitment who can assist their peers. Just as Home Depot salespeople include many retired tradespersons, such as plumbers and carpenters, who enjoy sharing their knowledge and talking with customers of all ages, so it could be with the library – a place for older people to share their knowledge.

“People in the grandparent generation have the ability to think about the needs of the future that their adult children may not. What is your vision for the library two generations from now?”

—*Mary Catherine Bateson*

Services must be administered by people who understand lifespan issues. Access to information and referral about work, service, leisure, health, and other issues are the greatest needs of older adults. Libraries must integrate new understanding about older adults’ needs for information and options across their institutions:

- Job and career centers are one example of the opportunity to adapt an existing service or reorganize around a different population.
- Consumer health services can be reconfigured to factor in the needs and interests of older adults.
- Computer training for active older adults is a growing need and should be part of the new model.

Across the country, libraries are beginning to develop services and programs that complement “senior services” and respond to baby boomers’ interests and needs. The Lifelong Access service framework developed by Americans for Libraries Council is one model for converting the new understanding about aging into specific programs and services. Its components include stakeholder involvement; provision of information on options for work, service and learning; community conversations about aging and retirement; intergenerational programming; and links to other agencies. Libraries in Arizona, Massachusetts, and Pennsylvania are beginning to implement the service model, including organization of Lifelong Advisory Councils and Community Conversations on Aging and Retirement.

Models and best practices can also be developed through the Institute of Museum and Library Services’ National Leadership Grants. These grants support innovative national models of library and museum programming and services. They enable libraries and museums to address current challenges, such as the aging revolution, in creative ways, to develop and test innovative solutions, and to expand the boundaries within which our cultural heritage institutions operate. These projects create new tools, research, models, best practices, and alliances that equip libraries and museums to better meet the needs of learners throughout the lifetime.

### **Learning, Communicating, and Becoming**

Lawrence Grossman, International Longevity Foundation and  
Mary Catherine Bateson, Institute for Intercultural Studies  
George Mason University

A goal of the Forum was to highlight new thinking that challenges traditional stereotypes about aging and illuminates opportunities for libraries. Two presentations highlighted the importance of rethinking some basic concepts about aging, including the importance of ongoing learning and creative expression and the possibilities for using new technologies and new programming to tap into the life experiences and talents of older adults.

**Lawrence Grossman** spoke from the perspective of an advocate for older adult engagement and a leader in the mass media who is now involved in advancing a national initiative that promises to benefit lifelong learning. **Mary Catherine Bateson** is an anthropologist who has written extensively on the place and meaning of aging in society.

Grossman began by characterizing the “longevity revolution,” which has added another generation of life during the past century, achieving what it took the previous 5000 years to attain. “Now we have a period of life that mankind has never experienced before.”

Retirement has changed, from a period of withdrawal from society to one of continued engagement. We need to imagine new approaches to education and work, with an emphasis on involvement, participation, and personal growth. We must find ways of bringing people back to libraries to renew skills, education, and lives. The digital environment enables us to bring forums, lifelong learning, culture, and education into people’s homes. While downloadable books and tapes from libraries can touch more people than ever than before, library programs where people can discuss and interpret books and ideas can stimulate community-wide communications and ongoing learning.

As one example of new opportunities to foster lifelong learning, Grossman and his colleagues have asked Congress to consider passing the Digital Opportunity Information Trust Act (DO-IT). DO-IT would take some of the proceeds from federal auctions of telecommunications spectrums and use them to improve the content of the education system, including museums and libraries. Digital information is more adaptable to older adults’ needs and would foster an era of continuous learning.

Grossman emphasized the need to overcome “ageism.” The mass media focuses on negative stereotypes of older adults. “Don’t be fooled!” warned Grossman. “Many tech-savvy older adults are out there.”

### **Learning, Communicating, and Becoming**

Mary Catherine Bateson, Institute for Intercultural Studies  
George Mason University

**Mary Catherine Bateson** began her presentation by commending the public library as, among other things, a place that nurtures the imagination, a foundation of insights—where people of all ages can explore other worlds. Such exercise of imagination is badly needed, she noted, to combat the prevailing ageist mentality: “As we look at aging in America, we are suffering from a major crisis of imagination.” She continued, “We have not absorbed the demographic changes that have taken place—the extraordinary opportunity created by having a cohort of people with 50+ life years of experiences, more assets than they would ever have had in the past, free time, and an unprecedented level of health and energy. This is a gold mine, not an old quarry to dump things into.”

To tap this potential, it is necessary to reimagine aging in order to break out of stereotypes and redefine the shape of a life. Libraries have the potential to make that possible, not just for the experts but for the older people themselves. In previous societies, as people got older they lost one role and assumed another, but usually as a productive person. The modern concept of retirement, originally meant for the very old, has become extended to younger and younger cohorts, without a concomitant set of roles for retired persons to assume.

The lengthening of the lifespan has opened up the possibility of imagining many generations of adulthood and for constant learning and “becoming.” Bateson emphasized the need to define more rites of passage in later life—loss, turning points, celebrations: “Adulthood lasts so long, nowadays, that it needs more punctuation points to give it shape.” People should be asked to take on new challenges at age 40 or 50, as a way of rethinking their careers and reflecting on bigger issues. Lifelong learning is a key determinant of successful aging. In a rapidly changing world, those who do not learn constantly are at a risk of becoming obsolete, no matter what their age. It is crucial in our society, where work and knowledge are so important to personal identity, that older adults are constantly learning new things, constantly seeking new challenges.

Older people can have an especially productive role owing to their ability to offer perspective. They have a lifetime of experience to draw on, and they are less preoccupied with the cares of midlife. Research suggests that older people become more able to make long-term decisions and assessments, and are able to think about future worlds, even those they may be unlikely to see.

### **The Lifelong Learning Brain**

Gene Cohen, Center on Aging, Health & Humanities,  
George Washington University Medical Center

One of the presentations focused on the emerging revolution in how scientists understand the biological bases for lifelong learning.

**Gene Cohen** began by sketching recent research suggesting that the brain is much more resilient and plastic, over the lifespan, than originally thought. Humans who remain mentally active keep their brain functions far into adulthood and are capable of learning at all ages. They are, quite literally, capable of remodeling their brains as they move through life. This has major implications for how we imagine the aging process and the position of the older person in society, and for how libraries relate to older adults.

Cohen outlined a schema of human development based on current research and his own work in cognitive development. He noted that during middle age, humans gain the ability to use both halves of the brain, left and right, thus expanding their mental capacity and gaining an integrated perspective.

Cohen defined four main life phases in later adulthood. The first is midlife reevaluation, from the 40s through the 60s, characterized by reevaluation, exploration, and transition. The second phase, liberation, can begin in the 50s and extend into the 70s. It is a time of experimentation and also of freedom: "If not now, when?" The third phase, summing up, usually starts in the 60s and can extend into the 90s. Its main features are recapitulation, resolution, and contribution. The last phase, encore, often beginning in the 80s, is a time of reflection, continuation, and celebration.

Cohen's presentation highlighted the importance of finding models of development and library services that avoid the stereotypical view of older people as being obsessed with their entitlements. Rather, we need to activate a whole cohort of seniors to think about the future of a world they may not be a part of. As people get older, they become more able to shape their opinions based on the interest of future generations: they can contribute a greater degree of perspective than people in midlife, who are so busy.

Cohen suggested that libraries could begin to reframe the issue in an easy and direct way by providing patrons with lists of readings that portray aging and the old in a positive light. He developed a bibliography, which is available at [www.lifelonglibraries.org](http://www.lifelonglibraries.org).





### **3. Training and Education**

A female child born today has a 50/50 chance of living to 100.

*– Judy Goggin*

Librarians have a limited concept of aging. They need to be educated in aging and brain development. We did a survey of librarians in Connecticut and found that they think they're already doing enough for older adults.

*– Kendall Wiggin*

Is there any interest in the possibility of a joint degree between library and social work schools? It is possible that many of the services [offered by these professions] will look like one indistinguishable lump – there is much overlap in competencies and concerns.

*– Jeanette Takamura*

Librarians, library-school students, and museum professionals need to understand the significance of demographic change and its implications, to learn about the aging process, and to imagine older adults differently. They must understand aging as both a biological and a cultural phenomenon. In addition, they require training in a range of competencies to address the information and learning needs of midlife adults and to mobilize a wide range of resources for a growing and influential segment of the population. A stand-alone “toolkit” on library services for active older adults might be very helpful. New or improved training is required to adequately work with baby boomers, for example in the area of communication and listening skills, which are not part of the library school curriculum.

Continuing education is vital for both professionals and non-degreed staff. All staff must be trained in lifelong issues so they can help direct and support library programming, budgeting, etc. Non-degreed staff members are often “the librarians” and are viewed that way by patrons; therefore they must be eligible for in-service training and continuing education.

Libraries and library systems are beginning to understand and address new needs for training. Americans for Libraries Council has had strong demand for its Lifelong Access training, which provides frameworks and benchmarks for reorganizing libraries to fulfill their potential as centers for productive aging. This work has underscored the value of a defined certificate that would provide an incentive for continuing education on the part of practicing professionals. It has also brought into focus the lack of content about services for active older adults in the curriculum of masters in library science programs and the need to develop content and standards.

IMLS provides robust support for professional training, continuing education, and research through the Laura Bush 21<sup>st</sup> Century Librarian Program, which funds projects

that educate current and future librarians to meet the challenges of the field. Priorities include programs and curricula that improve library services to specialized audiences such as seniors, incorporate perspectives from other disciplines and fields of scholarship, or promote knowledge of organizational leadership and collaboration.

Services for active older adults are potentially a new area of specialization in library schools. The profession should consider where this specialization could be introduced into the curriculum and whether the MLS curriculum needs new courses or course modules in this topic.

If this is a new specialty, its characteristics need to be defined. Should it be a concentration within existing curriculum, similar to children's librarianship? A dual degree with other disciplines? A certificate program similar to that awarded for medical librarians?

A related issue is the kind of person who is recruited into the profession. Library schools might consider changing their recruitment approaches and seek out the kinds of individuals who are good at counseling, not those who "love books and a quiet place to work."

Interdisciplinary perspectives and the potential for joint programs with schools of social work or gerontology should be considered as options. Working with older adults puts a premium on thinking across disciplinary boundaries. Librarians should reach out to individuals and organizations from a variety of fields such as medicine and social work. The Gerontological Society of America, other organizations in the aging network, and a variety of library associations could establish a joint committee to digest "what's out there." Federal funds from the Institute of Museum and Library Services could be used to study and design collaborative opportunities. The ALC Lifelong Access Libraries initiative's National Advisory Committee (see appendix C - Forum Participants List) offers a valuable point of connection across professions. Library schools have joint degree programs with law and education; they could also have joint programs with schools of social work, education, or nursing.

"Most societies have been gerontocracies: authority has increased with age. In a stable homogenous society – old people know how to live in that society. All their experience is relevant to life in that society. In a rapidly changing society, unless you are learning constantly, you are at risk of becoming obsolete."

*–Mary Catherine Bateson*

## **Lessons from Complementary Disciplines: Social Work and Nursing**

Jeanette Takamura, Dean, Columbia University School of Social Work

A goal of the forum was to encourage dialogue between librarians and experts in fields that are also grappling with older-adult issues and services. Jeanette Takamura offered a perspective from social work education and emphasized the importance of collaboration across professions.

**Jeanette Takamura** began by asking how social workers and librarians might be brought together in their common concerns about services to older people. It is important to recognize that our view of older age is changing: 65 is the new middle age. Old = 80+. Boomers should not be expected to feel like older people in previous generations; in fact, they report feeling on average seven years younger than their biological age. There is significant diversity between the leading edge and the youngest boomers, as well as within cohorts. For example, women do not see themselves as old until after 75; men, 70.

The Older Americans Act, first passed in 1965, is the framework for providing community services to older adults. The money is federal, allocated by state on a per capita basis, and budgeted through state and local agencies, which are lead players in what is called the aging network. Any effort for revising library services should take these agencies into account.

How do we re-vision community services? Services need to be welcoming, attractive, and accessible, and administered by people who understand lifespan issues. One such issue, for example, is the realization for many older people that their income will experience diminished purchasing power over time, owing to inflation. They are concerned about healthcare costs, access to health and wellness information—all needs libraries can help fill.

Another lifespan issue is that people want to continue to learn throughout their lives, not necessarily in a formal course of study. Additionally, they need information about financial services, health, and remaining active. Libraries have played a critical role in helping people access and analyze information. One of the most important opportunities provided by the library is computer access, because even people who don't like computers or use them with difficulty will go to the library to access online information.

Retirement is losing its quality as a defined event and is becoming a process: people gradually edge out of full employment and begin to define an alternative or complementary life. One place people look for options and ideas is the Aging and Disabilities and Resource Center (ADRC), an institution that first appeared in Wisconsin two decades ago and is being developed in many places as a one stop shop for all older adults in search of aging information and resources.

### **Lessons from Complementary Disciplines: Social Work and Nursing**

Andrea Sherman, Project Director, Consortium of New York Geriatric Education Centers, New York University Division of Nursing, Steinhardt School of Education

**Andrea Sherman** described the effort underway at the Consortium of New York Geriatric Education Centers (CNYGEC), based at the New York University College of Nursing, which has received a major grant from the federal Health Resources and Services Administration to conduct interdisciplinary geriatric health and gerontological training throughout New York State. Its efforts have focused on traditional older-adult stakeholders, such as nursing homes and hospitals, but its insights apply to public libraries as well.

Social service professionals use “quality of life” as a primary umbrella under which to design programs. They emphasize “creative aging” as a key approach, and acknowledge that older people are most satisfied when they feel they have choices and options in their lives.

The baby boomers are a diverse group and contain many ethnicities. It is therefore important that librarians, like social service providers, be trained in the principles of “cultural competence—a set of congruent behaviors, attitudes and policies that come together as a system, agency or among professionals and enable that system, agency or those professionals to work effectively in cross-cultural situations.”

They should also be sensitive to changes in housing and care options. Boomers are proving to be flexible in their housing patterns and inclined to choose cooperative living arrangements. Where and how people live may affect how the public library is configured to provide the right services.

Libraries can help older people find “transitional keys” that mark and give shape to their lives. Librarians need to be trained in lifecycle awareness and in being sensitive to loss and other turning points.

## **4. Community of Practice**

Libraries are so well positioned to help the disenfranchised . . . .  
Librarians can change the anti-aging atmosphere in this country.

*– Peter Maramaldi*

Libraries and other service institutions have the capacity to create  
significant pathways to new models for older adults.

*– Judy Goggin*

We should make assignments on how we will follow up on research,  
to see what models exist in the library community.

*– GladysAnn Wells*

Librarians sorely lack a network of peers for discussing older-adult services and related matters and a community of practice that includes representatives from other fields. Such a network could be built by raising professional awareness through presentations at meetings and conferences; by placing articles in professional journals and websites; and by establishing opportunities for online and in-person discussion. One precedent is the children’s librarian’s network.

The emerging community of practice could offer opportunities for encouraging innovation through the bestowing of awards and honors. Professionals enjoy being recognized by peers for their good work, even if the award is largely honorary. A database of such awards, if showcased online, could be an efficient way of helping “permeate” the profession with best practices.

Libraries need to work more closely with one another. Libraries of different types should collaborate. A public library might establish joint programs with a medical library, for example. Perhaps Americans for Library Council could work with several library organizations to organize a summit on productive aging.

ALC has begun implementing strategies for creating such a community of practice through its Lifelong Access Libraries initiative.

- One strategy is to mount an online Knowledge Center where both librarians and members of the public can find and access useful materials on aging and services to older adults. This portal will be launched early in 2006 at [www.lifelonglibraries.org](http://www.lifelonglibraries.org).
- A second strategy is to link participating Lifelong Access librarians via a training website at WebJunction. This site can be found at [www.ea.webjunction.org](http://www.ea.webjunction.org).

- A third strategy is the designation of certain public libraries that have outstanding services to older adults as Centers of Excellence. Three such sites were identified in 2005: The Allegheny County (PA) Library Association; the New Haven (CT) Free Public Library; and the Phoenix (AZ) Public Library. In addition to demonstrating new service approaches, the centers will provide opportunities for convening and connecting groups of Lifelong Access Libraries practitioners.

### **Volunteers or Workers?**

Brenda Brown of Chandler Public Library

Judy Goggin of Civic Ventures

Robert Martin of Texas Woman's University

Several short presentations formed the basis for a discussion about important issues relating to the role of older people as volunteers or workers in libraries and museums. The main concern was how to align the traditional concept of volunteerism with an emerging paradigm for paid work, even for people who are nominally retired and do not need paid work for a livelihood. The discussion about volunteers began with concerns about altering a view that they are often seen as a burden. There is a need to help librarians, especially at small libraries, manage volunteers. It is important to think about using them within the library as well as out in the community. A Library Corps was suggested as way to find people with the time and commitment. If libraries are to host older volunteers, they must involve them in more interesting, engaging ways that use their skills, including their technical skills. They must engage their human resource directors and be more intentional about making assignments that relate to life experience.

**Brenda Brown** described Chandler Public Library's Boomerang Project, an intensive outreach project, done in collaboration with a community college and a wide array of other community agencies that has created an experience bank of older adults. Boomer Volunteers write a profile of what they have to offer, which nonprofits review. This enables use of volunteers in creative ways, in and outside the library, such as in daycare delivery, a book-buddy program, and projects that assist economically disadvantaged libraries.

**Judy Goggin** helped frame an alternative view by observing that "fifty percent of Americans age 50-70 want jobs that contribute to the greater good now and in retirement." **Robert Martin** suggested that while volunteer programs are very important, it is necessary to think beyond them to envision a new model. He noted that 62 percent of growth in labor force is expected to come from people 55+. How do we provide professional, paid opportunities for older people?

## **5. Partnerships for Lifelong Learning and Civic Engagement**

Recognize that people want to learn, grow, and stretch their vision of themselves.  
Lifelong learning helps stretch people's notion of themselves.

*—Jeanette Takamura*

Libraries, I suggest, ought to join forces with public television, which itself tends to attract older audiences. Together they can be the interactive, reliable sources of trusted health information, financial information, and purposeful work skills, as well as useful, accurate information about travel, civic and volunteer activities, and other useful pursuits.

*—Lawrence Grossman*

Do we program for older adults, or do we engage them in planning?  
How do we move toward constituents planning their own programs/services?

*—Bernard Margolis*

While public libraries are natural centers for promoting lifelong learning and civic engagement, they cannot carry out this mission alone. Collaboration with educational, service, cultural, and other organizations and agencies could expand the reach and vision of library-based lifelong learning and civic engagement. It could establish an environment promoting opportunities for older adults and connecting them with the community. Depending upon local needs and assets, libraries can partner with one or two agencies or they can lead in organizing coalitions and service networks.

Libraries have other natural partners such as community colleges, volunteer centers, health educators, job-training agencies, and community development agencies. The New Haven Free Public Library, for example, has made a formal partnership with the local Volunteer Center. According to the library's director, James Welbourne, the library acts as a broker that manages all aspects of program and also connects volunteers to other opportunities in the community.

Their neutrality gives libraries the power to bring people and stakeholders together. Libraries have potential allies with the Aging and Disabilities Resource Centers (ADRCs) now being created across the country as one-stop shops for all older adults in search of aging information and resources. Since ADRCs and other bodies are going to control local funding and policy, libraries should work closely with them as well as with local area agencies on aging.

Examples of successful partnerships and collaborations need to be made more visible for wider replicability. The new Lifelong Access Knowledge Center will be useful in promoting examples of partnerships. IMLS supports partnerships between libraries, museums, and other community organizations through its National Leadership Grants. The Institute and the Corporation for Public Broadcasting have also created

an online resource center with case studies and tips for successful partnerships. ([www.partnershipforlearners.org](http://www.partnershipforlearners.org)).

### **Importance of Partnerships**

David Kahn of the Connecticut Historical Society;  
Toni Garvey of the Phoenix Public Library;  
Russell Lewis of the Chicago Historical Society

In the second-day plenary session, a consensus emerged that while libraries and museums are natural partners, they collaborate less often than they could or should.

**Toni Garvey** talked about her experience with library/museum collaboration in Phoenix, where the library began by working with one museum at a time. It secured funding from the state library to get collections in electronic format and incorporated them into the library catalogue. That led to more collaboration. One of the first collaborations was with the healthcare community: Children's Hospital resources were made available to patrons. The library also developed programs on health and education issues for new immigrants, the elderly, and other groups.

**Russell Lewis** noted that museums shape identity and meaning. Museums are really looking to partner with libraries because collaboration gives an opportunity to present new perspectives through exhibits, oral history projects, and outreach programs. The Chicago Historical Society did a program on teen identity in which teens interviewed older people about what it was like to be a teen. It was a revealing experience on both sides and provided an instructive example of intergenerational learning. A 93-year-old patron trained the young people on doing oral history. The exhibition is now at the Chicago Public Library.

**David Kahn** described a recent marketing survey, involving focus groups of 34-55 year-olds with and without children, to better identify the interests of the target constituency. What kind of partnerships can museums and libraries create with community groups? With Elderhostel? The museum community needs to address its stereotypes of aging: "What has come up in this conference has raised this issue, and I plan to re-examine our work with other educational and cultural organizations."



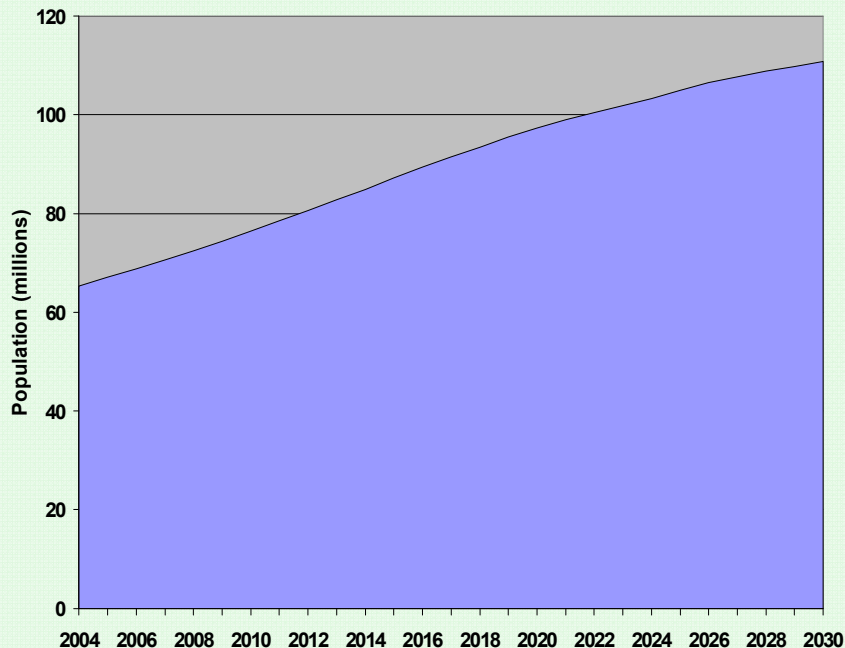
## Appendix A

### Trends: Older Adults, Productive Activity, and Civic Engagement

Barbara Butrica of the Urban Institute and Judy Goggin of Civic Ventures

Two presentations provided background on current research, including the significance of the baby-boomer generation for the broader society, with an emphasis on volunteerism and other forms of civic engagement.

**Barbara Butrica** provided data on the substantial increase in the number of older adults during the next 25 years. **Judy Goggin** characterized the rising median age of the population as the “Floridization of America”: by 2030 the national population will have an age profile similar to that in Florida today.



Projected number of older adults in U.S. population during next 25 years.

Source: Barbara Butrica

Both Goggin and Butrica noted that many retired adults seek to remain active in the community, and that those who are more active say they are more satisfied with retirement. “We have to rethink this age group,” noted Goggin. “They think they are younger than the same age group in previous generations.”

Butrica cited data showing that 80 percent of the age 55+ population is engaged in productive activities, and that most of those aged 55-64 are doing paid work. A third of older adults are involved in formal volunteer activity.

## Trends: Older Adults, Productive Activity and Civic Engagement

Degree to which surveyed adults 55+ are satisfied with their productive activities.

Source: Barbara Butrica



The high proportion of active adults means that organizations such as libraries and museums need to view older adults not only as users of services but also, in some sense, as participants in providing or at least defining the services. Goggin referred to older adults—“the experienced generation”—as the nation’s fastest growing natural resource.

The emergence of a new life stage, between midlife and true old age, has produced a large and growing cadre who are eager to remain active, and who see later life as a time for writing “a new chapter,” noted Goggin. Her organization, Civic Ventures, seeks to “reframe” the debate about aging by redefining retirement “in terms of social and individual renewal,” and by regarding older people as possessing enormous human capital that can be applied to the greater good of society.

In a recent Civic Ventures survey of older Americans, more than “two-thirds of those age 50 to 54 are interested in taking jobs now or in the future to help improve the quality of life in their communities.” Butrica’s data lead to a similar conclusion: “Many older people want to volunteer for the public good: one in three older adults devotes time to formal volunteer activities. . . . Adults age 65 to 74 average nearly 900 hours of productive activity each year—equivalent to about 45 percent of a full-time job.” While the trend to remaining engaged is encouraging, many sectors of society remain untapped, according to Butrica, who noted that nearly a fifth of older Americans do not engage in any of these activities, and members of less affluent groups are less likely to be engaged.

## Appendix B

### Selected Works by Presenters, National Advisors, and Aging Organizations

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## **Appendix C**

### *Agenda* **DESIGNS FOR CHANGE: LIBRARIES AND PRODUCTIVE AGING**

#### **A National Library Leaders Forum co-sponsored by Americans for Libraries Council and Institute of Museum and Library Services**

September 26 and 27, 2005  
Jurys Hotel, Washington, D.C.

#### September 26

9:00 – 9:30 am

#### **WELCOME. ACTIVE OLDER ADULTS: ARE WE READY?**

MARY CHUTE, Acting Director, IMLS;  
DIANTHA D. SCHULL, President, ALC  
GLORIA COLES, Director, Lifelong Access Libraries

9:30 – 10:15 am

#### **IT WOULD BE INSANE: SHAPING CHANGE**

EUGENIE PRIME  
Former Chair, National Library of Medicine; Former Dir.  
Corporate Libraries, Hewlett Packard

10:15 – 11:00 am

#### **LONGEVITY, LEARNING AND THE DIGITAL AGE**

LAWRENCE GROSSMAN  
Digital Promise; International Longevity Center; Americans for  
Libraries Council

11:15 – 12:00 pm

#### **REVISIONING COMMUNITY SERVICES FOR OLDER ADULTS**

JEANETTE TAKAMURA  
Dean, Columbia School of Social Work; Former HHS Assistant  
Secretary of Aging; 2004-5 Chairperson, Board of Directors,  
American Society on Aging

1:00 – 1:45 pm

#### **NEW HORIZONS OF LIFELONG LEARNING**

MARY CATHERINE BATESON  
Author, *Composing a Life*; President, Institute for Intercultural  
Studies; Founder, Granny Voter Project; Professor Emerita in  
Anthropology and English, George Mason University

1:45 – 2:30 pm

#### **ACTIVE AGING: STUDIES ON WORK AND SERVICE**

JUDY GOGGIN  
Senior Vice President, Civic Ventures

BARBARA BUTRICA  
Senior Research Associate, Urban Institute

2:45 – 3:45 pm      **ACTIVE AGING: APPROACHES TO PROFESSIONAL CHANGE**

PETER MARAMALDI  
Associate Professor and Hartford Faculty Scholar, School of  
Social Work, Simmons College

ANDREA SHERMAN  
Project Director, Consortium of NY Geriatric Centers, College of  
Nursing, New York University

LINDA HAROOTYAN  
Deputy Director, The Gerontological Society of America

3:45 – 4:45 pm      **LIFELONG ACCESS LIBRARIES: STRATEGIES FOR CHANGE**  
MODERATED ROUNDTABLES

7:30 pm              **IMAGES OF AGING**  
TOM ENDRES  
Director, Civic Engagement Initiative; National Council on the  
Aging; RespectAbility Project, Video, “On the Road”

**Announcement: Centers of Excellence**

September 27

9:00 – 9:45 am      **VITAL AGING**  
GENE COHEN, Director, Center on Aging, Health & Humanities,  
George Washington University Medical Center

9:45 – 11:45 am    **SETTING A LIBRARY AGENDA FOR CHANGE**  
MODERATORS’ REPORT ON ROUNDTABLE DISCUSSIONS;  
PLENARY DISCUSSIONS; RECOMMENDATIONS

11:45 – 12:00 pm   **CONCLUDING REMARKS**   CHUTE, COLES, SCHULL

## Appendix D

### Forum Participants

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