

# **Aging Survey Report Executive Summary, Partnerships for Aging Enrichment (PAE) Roger Hiemstra, Adjunct Professor, Consultant, June 10, 2018**

## **Introduction**

The Partnerships for Aging Enrichment began in 2017 and was built on the initial work of PAE Partner Norb Henry and his desire to create an effort to better serve Le Moyne College alumni, retirees, and older people in the greater Syracuse area and beyond. Working with two advisory groups, a central PAE core of people determined that an important next step was creating a survey to better understand some of the needs, interests, and desires for the future of Le Moyne College alumni and retirees. Thus, this report provides a summary of the important data obtained from an April, 2018, survey.

## **The Survey**

The survey asked respondents to provide their gender, age, and age at retirement from their primary occupation. There also were six open-ended questions: (1) Please describe what constitutes successful aging for you? (2) What has been your biggest challenge to the transition to retirement? (3) To date, what has been your greatest reward in retirement? (4) What could Le Moyne College do to enhance your life during retirement? (5) What areas of spiritual health would you recommend we explore? (6) In your quest for spirituality, what areas of spiritual health are missing in your retirement?

## **Limitations**

This study's analyses are limited in two ways. To begin with, analysis of the open-ended questions was carried out only by me. I have conducted many qualitative research projects in my career, but discussions with others regarding the decisions I made would have been helpful. Secondly, only a very small percentage of the mailed surveys were returned as is typical in a mailed survey. However, we are happy to have the responses we received so there now is an initial understanding of our potential clientele, some important insights into the "aging" person, and considerable future direction possibilities for PAE.

## **Administering the Study**

The Le Moyne College Office of Alumni and Parent Engagement played a large role in the administration process. They compiled a large list of alumni and retirees over the age of 55 that lived within a 100 mile radius of the College. A local mailing house distributed the surveys with postage guaranteed return envelopes. An online version via Survey Monkey also was made available.

As the forms were returned, PAE Director, Kate Tovar, maintained and organizing the surveys by sequentially numbering them with a three digit code (001, 002, 003, etc.) and going through each to do some initial coding (words and phrases that to her were important precursors for future analysis and understanding). Next, PAE Partner Shawn Ward compiled all the demographic (gender, age, etc.) information from each of the initial 224 usable returned surveys on an Excel spreadsheet. I later added the data from 14 surveys obtained after his entry efforts and 27 Survey Monkey forms. The final step in this administration process involved my work with the forms. I went through each of the resulting 265 forms to compile and code all of the qualitative answers from the six open-ended questions.

## **Demographic Information**

Utilizing the data from those forms, following are the findings (some items were left blank):

- The average age was 69.8 and the age range was 51 to 95.
- There were 122 females, 125 males, and 22 people who did not provide gender information.

## **Analysis Methodology**

I utilized a fairly typical qualitative approach to analyze the six open-ended questions. This involved reading through the questions to achieve an understanding of the respondents' written

comments. Using Kate’s underlined concepts, phrases, and even words that made sense within her world view of aging, I began to do the same thing annotating each different phrase or word with a code for later reference and analysis comparisons. For example, I used a unique code for each survey showing an individual’s sequential number, gender, and age.

Coding open-ended questions can be time-consuming at least initially, but it speeds up a bit over time as many of the codes (words, phrases, or categories) begin to cover the meanings of subsequent comments. Thus, ultimately I will have completed a code sheet, or page of codes, that correspond to each question. As an example, for the first question, “What constitutes successful aging for you,?” I recorded a term or terms like health, good health, physical health, mental health, etc. This “code” subsequently will begin to fill out as I go through the questionnaires such that multiple respondents will have mentioned as meaning successful aging. This results in knowing how many, their ages, and their gender of the associated people.

### Collapsing/Combining Codes

A typical second step in qualitative analysis is to determine how the codes can be diminished in number by combining codes or collapsing two or more codes into a single code for purpose of being able to deal with a reasonable number of unique comments. When I initially go through this process I typically cull down a long list of codes by 10 or 20 percent. This is all intended to come up with a set of codes or statements with robust meaning and that are truly differentiated from each other.

My next step is to record on to a master data sheet the demographic comparison information I want to use, in this case gender and age for the various remaining codes. This will be one step to future PAE initiatives for differentiating between and among people.

### Analyzing the Data

Upon completion of the coding, reducing the number of categories, and having a compilation of how many people of each gender and within certain age ranges responded, I next created comparison tables with total numbers for the various groupings and their rankings. Following is a summary of the top ranked set of responses for each question.

### What Constitutes Successful Aging

Table 1 provides various codes pertaining to respondents’ views, thoughts, and reactions regarding successful aging. The several other descriptors with lower ranks are in a larger report made available to the PAE leadership.

**Table 1 What Constitutes Successful Aging**

Category Descriptions	Gender			Age						Totals	Rank
	Female	Male	NR	51-67	Rank	68-95	Rank	80-95	Rank		
Good health (mental, physical, etc.)	73	76	11	67	1	93	1	35	1	160	1
Spending time with family/ friends	31	34	5	21	3.5	49	2	15	2	70	2
Keeping active/part-time work	27	26	3	21	3.5	35	3	11	3	56	3
Adequate financial security	15	26	5	24	2	22	6	6	4	46	4
Volunteer work/helping others	18	20	3	13	6	28	4	5	6.5	41	5
Contentment/happiness	16	19	2	10	9	27	5	5	6.5	37	6
Live a productive, purposeful life	13	15	2	17	5	13	9.5	5	6.5	30	7
Friendships/social life	16	8	2	10	9	16	8	5	6.5	26	8

The codes or categories are described within the first column of each table. Comparison data to help better understand the meanings obtained from respondents are shown correspondingly horizontally. For example, good health was the top priority. I utilized three age categories: 51-67, 68 and older, and 80

to 95. Finally, I looked at our population as a whole. Those shown in the 80-95 column are also subsumed in the 68-95 age group. I ranked the numbers in each age column for further comparisons.

From a subsequent program planning viewpoint, I found it interesting to see that good health, spending time with family, keeping active, and adequate financial security were consistently among the top contenders. This could be valuable information for future workshops, the inclusion of certain kinds of information on the PAE web page, and other kinds of support PAE might consider providing.

### The Biggest Challenge to Transitioning to Retirement

As Table 2 shows, finding things to do was at the top or very near the top for the two older age groups and overall. Pain, limitations, and health issues also came out highly ranked for the two older groups. Those of us in those age groups can certainly understand this ranking. There are obvious implications for future PAE programs and activities.

**Table 2. The Biggest Challenge to the Transition to Retirement**

Category Descriptions	Gender			Age						Totals	Rank
	Female	Male	NR	51-67	Rank	68-95	Rank	80-95	Rank		
Keeping myself occupied	9	19	1	11	3.5	18	2	6	2	29	1
Pain, limitations, health issues	12	14	2	7	5	21	1	12	1	28	2
Creating new social connections	15	10	0	11	3.5	14	4.5	2	9	25	3
Having health-related finances	15	8	0	12	1.5	11	6.5	5	3.5	23	4
Going from career to no work	10	10	1	12	1.5	9	8.5	0	14.5	21	5
Providing care for family	6	13	1	4	9	16	3	3	7	20	6.5
Dealing with death of spouse	15	5	0	5	6.5	14	4.5	5	3.5	20	6.5

### The Greatest Reward in Retirement

I have to admit that I looked forward to the results to this question. I know what I have found rewarding but suspected to find some differences. As Table 3 revealed, the top 5 rankings for my age group are exactly what I would have selected. My time with family, volunteering, freedom, spending time with grandchildren, and traveling are my top five. I need to note that I separated out spending time with children and grandchildren from being with spouse, family, and friends, rather than collapsing them together, because so many respondents seem to make that very distinction in their comments. I can foresee several future PAE activities designed to focus on some of these findings. How about family outings on campus? Why not have PAE individuals find volunteer opportunities and link them up with various people. Let's have a grandparent/grandchild fair, swimming time, or even some type of an associated learning activity on campus. The possibilities seem many.

**Table 3. The Greatest Reward in Retirement**

Category Descriptions	Gender			Age						Totals	Rank
	Female	Male	NR	51-67	Rank	68-95	Rank	80-95	Rank		
Being with spouse/family/friends	30	27	8	19	2.5	46	1	12	2	65	1
Being able to volunteer/help others	30	21	8	19	2.5	40	2	8	3.5	59	2
Flexibility/freedom	23	25	1	21	1	28	4	8	3.5	49	3
Being with children/grandchildren	20	24	1	11	4	34	3	13	1	45	4
Being able to travel	14	8	1	9	5	14	5	5	6.5	23	5

### What Could Le Moyne College do to Enhance the Lives of Older People

Table 4 reveals some of the wants and wishes of our alumni and retirees regarding possible assistance from Le Moyne College. The information in this table, perhaps more than any other, provides some fairly immediate marching orders for PAE. As to be expected, the top ranked category pertains to various courses, lectures, retreats, and seminars that can be offered. Fireside chats can be expanded and

cooperative efforts with OASIS, the Commission on Aging, FOCUS, and other groups are all possibilities for the immediate future.

**Table 4. How Le Moyne College Could Help Older People**

Category Descriptions	Gender			Age						Totals	Rank
	Female	Male	NR	51-67	Rank	68-95	Rank	80-95	Rank		
Offer various courses, seminars, etc.	44	28	5	33	1	44	1	7	1	77	1
Facilitate social events/gatherings	19	18	4	20	2	16	3	4	2	41	2
Free/inexpensive courses/resources	15	17	1	12	3	17	2	2	6.5	33	3
We could help w/ campus activities	7	9	1	5	6	9	4	2	6.5	17	4
Gym memberships/fitness support	9	4	1	5	6	8	5	2	6.6	14	5.5
Help us find volunteer pursuits	9	5	0	4	8	7	6.5	1	13	14	5.5
Host learning trips to destinations	6	6	0	5	6	4	9.5	2	6.5	12	7

### What Areas of Spiritual Health Should Le Moyne College Explore

Give Le Moyne College's Jesuit roots, and focal points discussed by PAE partners, providing some guidance in enhancing the spiritual health of older adults is an important component for future activities. As Table 5 demonstrates, there are varied opinions among the three age groups, although spirituality courses were ranked number one across all age groups. PAE staff may find value in discussing these findings with various religious leaders and educators to obtain a clearer picture of the possibilities and priorities. It is interesting that fewer people responded to this question than expected.

**Table 5. Spiritual Health Areas Le Moyne College Should Explore**

Category Descriptions	Gender			Age						Totals	Rank
	Female	Male	NR	51-67	Rank	68-95	Rank	80-95	Rank		
Spirituality courses and retreats	42	29	7	35	1	43	1	9	1	78	1
Gratitude for life	20	8	2	16	2	14	3.5	3	5.5	30	2.5
Help in becoming closer to God	13	13	4	6	10.5	24	2	7	2	30	2.5
Celebrating life as it is today	11	13	3	13	3.5	14	3.5	4	3.5	27	4
Anticipating future blessings	12	12	2	13	3.5	13	6	2	9	26	5
Importance of kindness/forgiveness	15	8	2	12	5	13	6	4	3.5	25	6

### What Areas of Spiritual Health are Missing in Retirement

Table 6 provides information related to this question. Most topics mentioned no doubt have special meaning for how Le Moyne College, as a Jesuit institution, can help fill in the areas expressed by the respondents. The few numbers responding to this question should be supported by further research.

**Table 6. Spiritual Health Areas Missing in Retirement**

Category Descriptions	Gender			Age						Totals	Rank
	Female	Male	NR	51-67	Rank	68-95	Rank	80-95	Rank		
Letting go of regrets	7	11	1	6	1	13	1	5	1	19	1
Becoming closer to God/Jesus	10	2	2	2	7.5	11	2	0	7.5	14	2
Help in meeting death/life after	4	4	0	3	3.5	3	5.5	0	7.5	8	3
Living a life of service to others	4	2	1	5	2	2	8	1	2.5	7	4.5
Spend more time in prayer	2	4	1	2	7.5	5	3	0	7.5	7	4.5
Help to maintain spiritual health	4	2	0	2	7.5	4	4	0	7.5	6	6.5
How to live a life of gratitude/joy	2	4	0	3	3.5	3	5.5	0	7.5	6	6.5

### The People Associated with This Survey

Norb Henry, PAE Partner; Roger Hiemstra, PAE Partner; Michael Madden, Managing Partner, Black Eagle LLC; Lynn McMartin, Associate VP, Retired, PAE Partner; Matt Read, Visiting Assistant Professor; Kathryn (Kate) Tovar, PAE Director; Shawn Ward, Associate Professor; Margaret (Megga) Wells, Dean, Purcell School of Professional Studies; and Msgr. J. Robert Yeazel, Partner, PAE