



## Evidence Informed Literature Review of Docutaining<sup>®</sup> Program, Connections: *Creating What's Next*<sup>™</sup>

Lauren M. Bouchard, M.S. Concordia University

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### Abstract

The following literature review provides an evidence informed overview of VistaLynk's Connections: *Creating What's Next*<sup>™</sup> program. The program focuses upon six domains: *Be Inspired, Create Wholeness, Keep Moving, Be Agile, Develop Wisdom, and Build Connections*. Scientific literature is presented for each domain independently; however, this program strategically makes use of the interdependence of the domains as a framework for growth, such that forward movement in one area may impact growth in another area's content. This review also provides potential benefits of each domain in terms of health and quality of life. Finally, a conclusion presents a generalized picture of the evidence basis of this intervention and calls for further program evaluation.

### Introduction

Due to the aging of the Baby Boomer generation, "aging well," "resilience," and "successful aging" have become popular terms in the gerontological literature, yet very little of the evidence is presented to older adults, caregivers, and others who desire to age well (Larkin, 2013). Older adults are often ensnared in complex medical, legal, and long-term care scenarios, and the public are often more likely to hear outdated or ageist stereotypes that lead to fearful and contradictory advice (Fullen, Granello, Richardson, & Granello, 2018). The literature regarding successful and positive aging indicates that adults throughout the life course can consider how to make the most of their own aging; but even those who are motivated to "age well" may lack clear guidelines about how to optimize their aging process (Nimrod & Ben-Shem, 2015).

Many adult children in the Gen X and Millennial generations are now caregiving for aging loved ones. While caregiving can cause immense psychological, emotional, financial, and physical strain on these adults, it often catalyzes self-reflection about one's own aging trajectory. Younger and middle aged adults may be wary of aging after years of negative stereotypes, personal stressors with caregiving, and difficulty with sys-

tems of care, but Connections: *Creating What's Next*<sup>™</sup> can help them build resilience and prepare for older adulthood. Connections: *Creating What's Next*<sup>™</sup> functions as a comprehensive tool to enable self-assessment and reflection, proper planning measures, and helpful evidence-based strategies for aging to the fullest.

The scientific literature in the fields of medicine, psychology, sociology, and gerontology have formed a web of evidence for aging well, yet few adults know the steps that can improve their experience. Aging can be seen as an opportunity rather than a burden through careful planning and changing the script on what it means to age with grace and gusto. The following program includes domains which focus on six well-supported categories of evidence: *Be Inspired, Create Wholeness, Keep Moving, Be Agile, Develop Wisdom, and Build Connections*. These modules include colorful, real world stories of successful aging, self-reflection components, discussion points, and concrete strategies in building resilience. In the following review of the scientific literature, each section is outlined with core tenets and evidence review of the domain. Pertinent references can also be found under domain headings at the end of the document.

## Domain Analyses

### First Domain: *Be Inspired*

Inspiration is a key aspect of aging well and relates to the idea of, “Gerotranscendence,” that is, meaningful engagement with life in older age. Gerotranscendence is based upon increased sense of interconnectedness, purpose in the world, and redefinition of the meaning of life itself (Tornstam, 1997). Tornstam (1997) described this concept as opposed to disengagement in later life and aligned with re-engagement with greater purpose, connection, and less focus on material items or unimportant social mores. It is based upon a maturation of perception that can occur with self-reflection, deep connections with others, and clear purpose for later years. Often, inspiration comes from a redefined personal narrative as the older person comes to terms with adversity throughout life, and passes this knowledge of resilience forward to friends, family, and other intergenerational social connections (Lohr, 2018). Reflection on inspiration may also cause a shift toward valued and purposeful activity (Browne-Yung et al., 2018; Lohr, 2018; Nimrod & Ben-Shem, 2015).

Lohr (2018, p.168) studied the impact of life story on older adults’ sense of resilience and purpose in later life. Results indicated this type self-reflection regarding, “remembering, composing, and sharing,” promoted sense of humor, optimism, and flexibility in thinking. The *Be Inspired* domain cultivates inspiration via internal values (i.e. knowing what you love) as well as outward expression (i.e. creating purpose and using gifts to connect with others).

Other studies have also found the benefit of self-reflection in positive physical and psychological health outcomes, specifically in terms of the continuity of identity and coping (Stanford, 2006; Browne-Yung, Walker, & Luszcz, 2017). Browne-Yung and colleagues (2017) reported maintaining a continued sense of meaning and purpose was a salient theme for the oldest old in terms of their above average longevity. These adults near the end of life reported that maintaining purpose throughout life, regardless of age, was key to their success (Browne-Yung, 2017). Inspiration based rituals can also buffer health outcomes in older age (Sherman & Weiner, 2011). For example, older adults who employ rituals (e.g. meaningful or symbolic actions) can “lessen anxiety, dispel fear, and provide deep personal integration and mean-

ing (Sherman & Weiner, 2011, p. 48).

This domain mirrors the gerontological literature in terms of clarifying values, passions, and purpose, as well as in terms of connecting socially and intergenerationally. In terms of transcending the traditional narratives about aging, many older adults view successful aging as a process which begins much earlier in life rather than a fixed state in old age (Nimrod & Ben-Shem, 2015). For these older adults, inspiration,” continues throughout life and early investments in valued activities are key (Nimrod & Ben-Shem, 2015). However, younger people may have difficulty perceiving inspiration as a life-long pursuit. Reflection and exposure to older adults who know what they love, as well as examples of purpose in life and using gifts, may provide a chance for earlier evaluation.

#### *Be Inspired* Summary

- Inspiration may catalyze aging well as both internal resources (Browne-Yung et al., 2017; Tornstam, 1997; Lohr, 2018; Nimrod & Ben-Shem, 2015) and external connections (Tornstam, 1997; Lohr, 2018; Sherman & Weiner, 2015).
- Inspiration may provide tangible health benefits such as lessened anxiety (Sherman & Weiner, 2011) or increased longevity (Browne-Yung et al., 2017).
- “Be inspired” is a process that can begin earlier in the life course and potentially provide later health and social benefits (Nimrod & Ben-Shem, 2015).

### Second Domain: *Create Wholeness*

The literature around resilience in aging also echoes the importance of “wholeness”, that is, knowing who you are, taking care of yourself in body, mind and relationship, being true to oneself, and being self-determined in aging and end of life planning. Stanford (2006) reported thriving in old age similarly to the idea of *Creating Wholeness*. These participants gave advice such as, “Take care of yourself. Help others. Give back,” and “Face problems.” There’s always an answer if you don’t panic (Stanford, 2006, p. 900).” This focus upon

self-care and self-determination is also mentioned in studies showing the importance of self-compassion (i.e. treating oneself with care and understanding) in buffering stress in health outcomes (Smith, 2015). This domain supports adults in caring for themselves in both practical and logistical ways.

Self-reflection and careful planning are also key in well-being in later life. For example, many older adults indicated the importance of “investing” in earlier life stages, if possible (Nimrod & Ben-Shem, 2015, p. 817). For these elders, *Creating Wholeness* was about health investments (e.g. caring for one’s physical and mental health), life resources (e.g. life and death planning), and coping resources as older age often came with increased losses (Nimrod & Ben-Shem, 2015).

In addition, older adults must consider what it means to have “health within limitations” as they are often facing increased disability and chronic health conditions (Domanjko & Pahor, 2015, p.187). However, *Creating Wholeness* is a concept based upon resilience often defined as bouncing back after adversity. Manning and colleagues (2014) indicated resilience can buffer late life disability (e.g. challenges with activities of daily living) when older adults are diagnosed with a chronic health condition that might affect their functioning. *Creating Wholeness* focuses upon wholeness in the midst of losses, life transitions, and/or limitations.

### **Create Wholeness Summary**

- Self-compassion (especially in caring for oneself in the midst of limitations) and resilience is an important aspect of creating wholeness across the life course (Stanford, 2006; Smith, 2015).
- Creating wholeness is a process that can start early in adulthood (Nimrod & Ben-Shem, 2015).
- Resilience can buffer potential consequence of health limitations in older age as evidenced by more functional ability despite chronic illness (Manning et al., 2014).

### **Third Domain: Keep Moving**

The importance of mental and physical activity is well documented in the aging literature. Physical activity has been shown to play an important role

in preventing depression in older adults (Ávila, Corrêa, Lucchetti, & Lucchetti, 2018) and improve the quality of life in older age (Sertel, Arslan, Kurtoglu, & Yildirim, 2017). Older adults who exercised consistently typically have better self-image (Fullen, Granello, Richardson, & Granello, 2018). Older adults regardless of chronic illness or disability, may be more able to complete activities of daily living due to resilience gained in earlier life experiences (Manning et al., 2014).

There is also a relationship between having a sense of meaning in life and many older adults’ ability to maintain positive activity in their lives (Steptoe & Fancourt, 2019). These authors report that ‘life meaning’ had a stronger association with better mental and physical health, social contact, and worthwhile activity, and also had less loneliness and challenging health symptoms (Steptoe & Fancourt, 2019). This study indicated that ‘meaning in life’ may influence the desire to keep moving physically, mentally, and emotionally. Older adults who rated life as being meaningful may also be more likely to keep moving in terms of physical activity, learning, and social relationships.

Additional research found older adults who espouse purpose in life (PIL) were more likely to report better health and quality of life outcomes (Musich, Wang, Kraemer, Hawkins, & Wicker, 2018). This study surveyed 16,000 older adults who were insured by a United Healthcare AARP Medicare supplement in 2016 (Musich et al., 2018). The older adults who reported high purpose scores also reported higher levels of social support, resilience, health literacy. Participants with less purpose in life (in the low vs. high group) typically were less compliant with health care. Finally, purpose in life was associated with a positive perception of one’s own physical and mental health in the statistical model. The authors (Musich et al., 2018, p. 145) reported “several researchers have recommended a focus on goal-driven, meaningful activities defined as hobbies, volunteerism, religious involvement, or physical activities (Boyle et al., 2019; Boyle Buchman, & Bennett, 2010; Krause, 2009; Kim, Strecher, & Ryff, 2014; Hooker & Masters, 2016; Pinquart, 2002). This research concludes more interventions could be a promising development to bolster better outcomes for older adults with lower purpose in life.

This module explores the idea of moving broadly and from multiple perspectives. For example, older adults who are able to keep learning in both formal and informal settings may benefit from the active pursuit of knowledge from a cognitive and social context (Tam & Chui, 2015). Many older adults desire to learn for personal fulfillment, and they often view the pursuit of learning as impacting their own mental and physical health (Tam & Chui, 2015). Tam and Chui (2015) found that learning is correlated with life satisfaction, happiness, and general health and well-being. Often engagement with new subjects or material also aided in cognitive flexibility about new or changing ideas. Many older adults believed successful aging included engagement and life-long learning as well as the ability to adapt to new circumstances and ideas (Fullen et al., 2018).

#### **Keep Moving Summary**

- *Keep Moving* can refer to any activity that is meaningful and causes forward momentum physically, mentally, emotionally, and spiritually (Fullen et al., 2018; Steptoe & Fancourt, 2019).
- There is a statistical relationship between a meaningful life and general activity and well-being (Steptoe & Fancourt, 2019).
- Physical activity (i.e. exercise) is associated with well-being (Fullen et al., 2018; Avila et al., 2018; Sertel et al., 2017).
- Cognitive movement may include life-long learning, mental flexibility, and adapting to new ideas and circumstance (Tam & Chui, 2015; Fullen et al., 2018)

#### **Fourth Domain: *Be Agile***

Agility in this domain is defined by the ability to be flexible and adaptable to life circumstances. This tenet of the Connections: *Creating What's Next™* is salient to challenges of older adulthood such as loss and grief, disability and illness, and life transitions in work, family, or social connections. This model is related to the idea of resilience as a learned process where people can learn to adapt and bounce back from adversity. Hayman, Kerse, and Consedine (2017) described resilience for older adults as

subjectively different given markedly different circumstances in health, social context, and other factors. For these reasons, these researchers indicated resilience must focus on “what is possible despite limitations (Hayman et al., 2017, p. 577).”

This module similarly provides space for self-reflection regarding adversity and introduces concepts such as living moment to moment, practicing forgiveness, and enacting change. Psychological concepts such as ‘savoring’ (i.e. purposeful observation of positive emotions and experiences; Smith & Smith, 2015), ‘self-compassion’ (e.g. directed compassion towards oneself; Smith, 2015), and ‘meditation’ (Tornstam, 1997) are each key in developing resilience as limitations are inevitable in the aging process (Domanjko & Pahor, 2015; Tovel & Carmel 2013). Coping can be described as a kind of agility in adjusting and adapting to life’s circumstances (Tovel & Carmel, 2013). These researchers indicated challenges in later life are inevitable, but proactive coping skills can be acquired through targeted interventions. Proactive coping includes being able to adapt and change as necessary and keeping an open mind toward scenarios that might occur in the future (Tovel & Carmel, 2013).

#### **Be Agile Summary**

- Agility is the ability to learn, grow, and adapt to challenging situations (Hayman et al., 2017).
- This key aspect of resilience is often associated constructs such as ‘savoring,’ ‘self-compassion,’ and ‘meditation.’ (Smith & Smith, 2015; Smith, 2015; Tornstam, 1997).
- Proactive coping is a type of agility many people can learn to prepare for future challenges including loss, life transitions, and death (Tovel & Carmel, 2013).

#### **Fifth Domain: *Develop Wisdom***

While many older adults do develop wisdom throughout their lives, chronological age does not necessarily guarantee self-reflection, correction of mistakes, altruism, spiritual growth, or the ability to experience beauty or compassion.

According to Yang (2014, p. 129), wisdom is developed over time via the three components of “cognitive integration, embodiment in actions, and positive effects for oneself and others.” Wisdom is a learning process that is often self-reflective as well as collaborative with others.

This domain focuses on: reflecting on your life, correcting mistakes, looking for beauty, practicing compassion, and surrendering to something greater. The combination of both self-reflection and outward altruism fits within Yang’s (2014) components of developing wisdom over time. This module also focuses upon ‘savoring’ as mentioned by Smith (2015) and life review and oral history (Dorfman, Méndez, & Osterhaus, 2009; Lohr, 2018; Stanford, 2006). These constructs are important for wisdom development as well as creating a sense of wholeness and inspiration in later life. Finding something greater may refer to an elder’s sense of religious and/or spiritual orientation towards aging. For example, Shukla (2015, p. 2015) described spirituality as “a sense of self, is a synthesis of personal, self-expressed beliefs and activities of essence of being that balances and connects other dimensions and domains of human traits and health.” Manning (2012) described spiritual resilience as a way to cope with adversity across life. Others find traditional religious practice reassuring in studying and developing wisdom and meaning in later life (Manning, 2012).

### ***Develop Wisdom Summary***

- There is considerable literature that reported wisdom as a learned process from experience rather than a byproduct of chronological age alone (Yang, 2014).
- Older adults often use religion and spirituality to cope with adversity and their beliefs and feelings about “something greater than themselves” may impact later life outcomes (Dorfman et al., 2009; Manning, 2012).
- Self-reflection (e.g. life history; Lohr, 2018) is a necessary component to developing wisdom as religion, spirituality, and other factors of lived experience vary considerably (Manning, 2012, Yang, 2014).

## **Sixth Domain: *Build Connections***

Relationships, with family, friends, or other social connections, are imperative for health and well-being in older adulthood. Relationships with family can provide practical support as well as joy in social connections (Martin, Distelberg, Elahad, 2015). Social support is often a predictor in well-being in older age; however, social networks often change for older adults who are at risk to become more socially isolated (Browne-Yung et al., 2017; Martin et al., 2015). For example, Browne-Yung and colleagues (2017) reported, “changing social networks” as a salient theme in their research, where many older adults indicated the importance of maintaining social connections despite any health or physical limitations.

Often loss in older adulthood causes a shift in the availability of a social network. Hahn and colleagues (2011) reported that most of the research on widowhood was focused on declining social networks, yet women who had been widowed and found support from neighbors, friends, and religious groups developed resilience. Tovel and Carmel (2014) found a positive association between social support and successful aging.

Family can also provide an environment for successful aging (Martin et al., 2015). Older adults who face limitations due to disability, may need help from friends, family members, or service providers more than ever before (Domanjko & Pahor, 2015; Martin et al., 2015). Often, this is a new level of interdependence for older adults and younger family caregivers who may both give and receive in the relationship (Martin et al., 2015). However, this is also an area where planning is important because informal and unpaid caregiving may cause stress on many members of a family system.

Finally, building intergenerational connections is key for both older adults utilizing this intervention as much as younger and middle aged students preparing for careers with people across the life course. Kane (2008) conducted a study regarding social work students and their ideas regarding older adults and aging in general. They typically estimated more ageist stereotypes to older adults (e.g. frailty) while forecasting they would be less vulnerable at that age. Kane (2008) indicated intergenerational work is also key for

for younger adults to establish deeper understanding. Regardless, intergenerational connections can be beneficial for both parties. Building connections may broaden one's ideas for social support, career enhancement, and understanding between generations.

### ***Build Connections Summary***

- Social support is essential to aging successfully regardless of physical limitations (Sirkin Martin et al., 2015; Domanjko & Pahor et al., 2015).
- Families are often an important form of social support, yet this arrangement requires careful preparation and planning to remain tenable (Sirkin-Martin et al., 2015).
- Intergenerational relationships may require more intention, but they are often beneficial for all members.

### **Conclusion**

VistaLynk's Connections: *Creating What's Next™* program for Boomers and older adults aims to create growth and resiliency that may impact better aging outcomes. Using self-reflection, discussion with others, and concrete steps based on a personal needs assessment, the domains (*Be Inspired, Create Wholeness, Keep Moving, Be Agile, Develop Wisdom, and Build Connections*) usher participants forward in the inner development which the evidence in the fields of psychology, gerontology medicine and sociology has supported as being fundamental to successful aging. Given that the vast literature on resilience and aging well shows a correlation and synergy between attributes such as inspiration, self care, adaptability, and social connectivity, we can anticipate that even the adoption of one or two of the domain skills may catalyze growth across the entire 6-skill framework. Although the intervention may require a program evaluation, as it stands, it is well informed by the wealth of knowledge in the scientific literature.

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