

University of Northern Colorado

## Scholarship & Creative Works @ Digital UNC

---

Dissertations

Student Research

---

8-2022

### **“I Just Want to Play”: Methodological Considerations For Including Older Adults in Co-creation of Research With A Focus on the Meaning of Activity for Residents of a 55+ Active Adult Master Planned Community**

Becky Alice De Oliveira

Follow this and additional works at: <https://digscholarship.unco.edu/dissertations>

---

©2022

BECKY DE OLIVEIRA

ALL RIGHTS RESERVED

UNIVERSITY OF NORTHERN COLORADO

Greeley, Colorado

The Graduate School

“I JUST WANT TO PLAY”: METHODOLOGICAL CONSIDERATIONS FOR  
INCLUDING OLDER ADULTS IN CO-CREATION OF RESEARCH WITH  
A FOCUS ON THE MEANING OF ACTIVITY FOR RESIDENTS OF  
A 55+ ACTIVE ADULT MASTER PLANNED COMMUNITY

A Dissertation Submitted in Partial Fulfillment  
of the Requirements for the Degree of  
Doctor of Philosophy

Becky Alice De Oliveira

College of Education and Behavior Sciences  
Department of Applied Statistics and Research Methods

August 2022

This Dissertation by: Becky Alice De Oliveira

Entitled: *“I Just Want to Play”*: Methodological Considerations for Including Older Adults in Co-Creation of Research with a Focus on the Meaning of Activity for Residents of a 55+ Active Adult Master Planned Community

has been approved as meeting the requirements for the Degree of Doctor of Philosophy in the Collect of Education and Behavioral Sciences in the Department of Applied Statics and Research Methods, Program of Applied Statistics and Research Methods

Accepted by the Doctoral Committee

---

Maria K. E. Lahman, Ph.D. Research Advisor

---

Randy J. Larkins, Ph.D. Research Advisor

---

William R. Merchant, Ph.D. Committee Member

---

Joyce Weil, Ph.D. Faculty Representative

Date of Dissertation Defense \_\_\_\_\_

Accepted by the Graduate School

---

Jeri-Anne Lyons, Ph.D.  
Dean of the Graduate School  
Associate Vice President for Research



## ABSTRACT

De Oliveira, Becky Alice. *“I just want to play”*: Methodological considerations for including older adults in co-creation of research with a focus on the meaning of activity for residents of a 55+ active adult master planned community. Published Doctor of Philosophy dissertation, University of Northern Colorado, 2022.

Co-creation of research with older adults is examined methodologically and the meaning of activity for older adults living in a 55+ active adult master planned community is examined contextually. Older adults are often the subjects of research but rarely involved as co-creators. Literature on co-creation of research indicates that it allows stakeholders greater participation (Halvorsrud et al., 2021), and older adults should be seen as stakeholders (Weil, 2015). This perspective challenges bias toward older people (van den Berg et al., 2019), and acknowledges the wealth of knowledge they possess as “experts” (Partridge, 2022). While potential exist for co-creation of research with older adults, it was important to establish the extent to which they are willing to spend their time in this way. The methodological research question was: “What are methodological questions when involving residents of a 55+ active adult master planned community as co-creators of research,” Research on activity for older adults shows that successful aging is often portrayed as “active, engaged, and healthy” (Huijg et al., 2017, p. 234), part of what Estes referred to as the “contemporary aging enterprise” (as cited in Timonen, 2016, p. x). Retirement communities, master-planned age-restricted communities, and community centers provide activities based on their beliefs about what older adults need and want. Although older adults represent a diverse population, they generally report that they enjoy being “active.” What we did not know was how they define “activity,” what it means to them, or which activities

they prefer. The contextual research questions were, “How do residents of a 55+ active adult master planned community experience “activity”?” and “Which activities do residents of a 55+ active adult master planned community prefer?” I lived a 55+ active adult master planned community called Sequoia Heights (a pseudonym) for six weeks as a participant-observer. Data were 14-day activity journals, extensive observation, in-depth interview with 17 participants, and collaboration in developing and disseminating a survey (N = 57). Methodological findings showed that while some participants expressed willingness to be involved in co-creation of research, many were hesitant, with a focus on other priorities, allocation of time, and lack of interest appearing as key themes. Contextual findings indicated that while older adults are often encouraged to remain “active,” to experience successful aging, there is little consensus on what this means. Many were inclined to label “activity” as physical, but the majority indicated that activity is special, uses significant time, and is varied. Views about an “active person” including being engaged, being independent, getting out, doing physical activities, and doing social activities. They value activity primarily for its effect on their physical and mental health. Living in a 55+ active adult master planned community appears to help facilitate greater activity for those who are interested. Older adults at Sequoia Heights prefer activities that are physical, followed by social and intellectual activities. They enjoy both routine and special activities.

*Keywords:* Active aging, age-qualified communities, case study, co-created research, older adults, participant observation, survey research

## ACKNOWLEDGEMENTS

First, an acknowledgement to those who participated in the research that made this dissertation possible: Carol, Dave, Debra, Dolores, Joan, Karol, Kay, Lin, Mark, Michele, Page, Pat, Paul, Peter, Ray, Sharon, and Stanley. While walking in the forest, Dave told me a great story. “There is a kind of bamboo that you must water faithfully for five years before it starts to grow. During those years, you have no idea whether anything is happening; you keep watering. When the bamboo starts to grow, it grows exponentially, up to 90 feet in a few weeks.” I told him I loved that story so much I would find a way to use it in my dissertation. He phoned me a few weeks later, worrying about his inability to find verification that such a bamboo exists. “I don’t want you to fail your dissertation because some old guy told you something crazy.”

I had not found verification either. “I’ll put it in the acknowledgements,” I said.

Whether the story is factual or not, it nicely illustrates the point that good people have “watered” me faithfully over the years. At the University of Northern Colorado (UNC), my final academic home, these have included all four members of my dissertation committee: Maria Lahman, Randy Larkins, William Merchant, and Joyce Weil. I could not have asked for a better group of people to guide my work. I am also grateful to Susan Hutchinson, Khalil Shafie, and Chia-lin Tsai, faculty members in the Department of Applied Statistics and Research Methods, along with former administrative assistant Keyleigh Gurney. I have truly enjoyed the time I spent studying and working at UNC, and greatly appreciate the friendship and support I received.

Previous academic influences for which I am grateful are clustered at Walla Walla College (now University), Andrews University, and the University of Western Michigan. As a

history major/English minor at Walla Walla College, Terrie Aamodt, Beverly Beem, Roland Blaich, Terry Gottschall, Robert Henderson, and Gary Wisbey deserve special thanks for instilling a love of learning in me that has lasted throughout my life. Julian Melgosa and Michael Pearson were influential at Andrews University's Newbold College campus in England where I graduated with a master's degree in education. I began teaching on the main campus in Michigan 10 years later, first as an adjunct in the English department and later as a full-time faculty member in the Department of Leadership and Educational Administration. Colleagues and friends who encouraged me to continue my education (and generally made life a lot more fun) include Marji Bates, Erich Baumgartner, Bruce Closser, Duane Covrig, Ivan Davis, David Ferguson, Shirley Freed, Gary Gifford, Sylvia Gonzalez, Douglas Jones, Meredith Jones-Grey, Rick Kosinski, Janet Ledesma, Beverly Matiko, Robson Marinho, Glenda Patterson, and Joseph Warren. I have travelled, presented papers, and conducted writing retreats with several of these individuals, always having an amazing and memorable time. Western Michigan University, where I completed more than 3 years of a doctoral program in English Education, was also a wonderful academic experience. I greatly value the influence of Ellen Brinkley, Jonathan Bush, Christopher Nagle, Thisbe Nissen, Eve Salisbury, Scott Slawinsk, Gwen Tarbox, and Allen Webb.

My father, David Crooker, continues to be my biggest cheerleader, and my mother, Alice Crooker, also fulfilled that role until the day she died. They, along with my brother, Dan, and his family, have my deepest gratitude.

And last of all, as if to underscore their importance in my life, I offer thanks to my husband, Japhet, and our two sons, Joshua and Jonah. They have brought so much joy in so many ways. I am grateful for their unconditional love and support, especially during the times I

have locked my home office door, vowing to strangle anyone who dares to knock. Forgive me; I was mostly joking.

## TABLE OF CONTENTS

### CHAPTER

I.	INTRODUCTION .....	1
	Methodological Focus: Co-Creation of Research with Older Adults .....	1
	Contextual Focus: Meaning of Activity for Older Adults .....	3
	Theoretical Framework: Impression Management .....	6
	Description of this Study.....	6
	Research Questions .....	7
	Summary of Chapter I.....	9
II.	REVIEW OF LITERATURE .....	10
	Involving Older Adults as Co-Creators of Research.....	10
	The Meaning of Activity for Older Adults in a 55+ Active Adult Master Planned Community.....	19
	Conclusion .....	54
	Summary of Chapter II .....	55
III.	METHODOLOGY .....	56
	Researcher Background and Stance .....	56
	Shifting Fortunes.....	58
	Epistemology .....	59
	Social Constructionism and Pragmatism .....	60
	Theoretical Framework .....	65
	Methodological Framework.....	70
	Case Study Setting and Participants.....	74
	Data Collection .....	75
	Data Analysis .....	86
	Trustworthiness .....	88
	Ethical Considerations .....	92
	Findings Presentation.....	95

	Summary of Chapter III .....	96
IV.	FINDINGS.....	97
	The Meaning of Activity for Older Adults With a Methodological Focus on Co- Creation of Research.....	99
	Interview Participants .....	101
	Methodological Considerations .....	113
	Doing Co-Creation of Research at Sequoia Heights.....	119
	Meaning of Activity for Older Adults in a 55+ Active Adult Master Planned Community.....	132
	Preferred Activities for Older Adults in a 55+ Active Adult Master Planned Community.....	170
	Photographs and Artifacts .....	183
	Summary of Chapter IV .....	183
V.	DISCUSSION AND CONCLUSIONS .....	186
	Introduction.....	187
	Statement of the Methodological Problem.....	187
	Statement of the Contextual Problem .....	188
	Research Questions .....	188
	Overview of the Study .....	188
	“I Just Want to Play”: Methodological Findings .....	192
	“Doing Nothing Drives Me Nuts”: Contextual Findings.....	195
	Preferred Activities .....	201
	Where to Go from Here? Next Steps .....	202
	Recommendations for Co-Creating Research With Residents of a 55+ Active Adult Master Planned Community .....	203
	Suggestions for Further Research .....	204
	Conclusion .....	205
	REFERENCES .....	207
	APPENDICES	
A.	DEFINITION OF TERMS .....	246
B.	DEMOGRAPHIC ITEMS .....	248
C.	RECRUITMENT LETTER.....	251
D.	INSTRUCTIONS FOR THE ACTIVITY JOURNAL.....	253

E.	LAYOUT OF THE ACTIVITY JOURNAL .....	255
F.	INTERVIEW GUIDE.....	257
G.	INSTITUTIONAL REVIEW BOARD APPROVAL .....	259
H.	CONSENT FORM.....	263
I.	PARTICIPANT AND COMMUNITY PHOTOS .....	265



## LIST OF TABLES

### TABLE

1. Data Flow Chart for the Four Phases of the Study .....	76
2. Methods Used to Increase Trustworthiness (Korstjens & Moser, 2018, p. 121) .....	90
3. Summary of Participant Demographic Characteristics .....	101
4. Participant Yield from Two Different Gatekeepers .....	123
5. Participant Survey Question Suggestions .....	124
6. Examples of Activities Reported in Activity Journals by Category .....	135
7. Summary of Activity Defined .....	142
8. Themes in Defining an “Active Person” .....	143
9. Most Important Characteristics of Community .....	154
10. Overall Satisfaction with Sequoia Heights .....	159
11. Activities Per Week .....	160
12. Contribution to Quality of Life .....	160
13. Effect of COVID-19 Pandemic on Activity Level .....	161
14. Descriptions of an Ideal Day .....	179
15. Participant Observation Activities .....	181

## LIST OF FIGURES

### FIGURE

1. Example of Journal Entry .....	137
2. Positive Effects of Being Active .....	145
3. Top Three Rankings for Frequency of Activity .....	172
4. Top Three Rankings for Enjoyment of Activity.....	173

## CHAPTER I

### INTRODUCTION

The people who have an active life like I do, or [my wife] did, where you're out and about [do well here]. It's not a community for people like my mother-in-law who's got dementia, she can't get out and about. She really can't walk. —Mark, study participant

This research study focused on the methodological issue of co-creation of research with older adults, specifically those living in a 55+ active adult master planned community. It has a contextual focus on the meaning of activity for older adults in a 55+ active adult master planned community. This chapter briefly and sequentially describes the two related aspects of the study, providing background information, a statement of the problem, the purpose of each aspect of the study, and an overall description of the study.

#### **Methodological Focus: Co-Creation of Research with Older Adults**

Co-creation of research (see full list of Definitions of Terms in Appendix A), a concept originating from product development (Battersby et al., 2017), is generally defined as “the collaborative generation of knowledge by academics working alongside stakeholders from other sectors” (Greenhalgh et al., 2016, p. 393). The purpose is to “developed control” so that stakeholders “can be more active in the design of the services they receive” (Halvorsrud, et al. (2021, p. 197). Participant co-creation of research is a popular concept seen not only in product design (Füller et al., 2011), but in government policy (Brandsen et al., 2018; de Jong et al., 2019), tourism (Neuhofer, 2016), and healthcare (Tartaglione et al., 2018), to name a few. Brandsen et al. (2018), point to “citizen engagement in the public domain” as “the main focus of

research” (p. 3). The participation of older adults as a specific demographic group as co-creators of research is thought to provide benefits to both researchers and older adults. For instance, older adults are acknowledged to possess abilities that are useful and that challenge prejudicial attitudes toward them (van den Berg et al., 2019). Co-creation with older adults has both positive and negative aspects (Wanka, 2021). Older adults can apply their wealth of knowledge to research as “experts” (Partridge, 2022), and they are important voices in the issues that affect their lives (Applewhite, 2016). However, like many other people protective of their time, those asked to use a portion of it co-creating research may well ask, “What’s in it for us?” (Jacelon, 2007, p. 64). Boylan et al. (2019) report attitudes to co-creation of research as ranging from “cynical to ambivalent to positive” (p. 728). It is crucial that older adults, who are too often subject to cultural narratives that define them in restrictive ways (De Medeiros, 2016) have greater opportunities to use their own voices in a meaningful way that engages with the research (Suarez-Balcazar, 2020). ). Age-restricted active adult communities can offer benefits to researchers, including a ready-made sampling frame, greater ease of recruitment and retention, and community-level support of research. (Nishimi et al., 2022).

### **Statement of the Methodological Problem**

I believe that “as researchers, we should enable the desires of older adults to be heard” (Davidson & Jensen, 2013), p. 43). Older adults are often overlooked professionally, a “waste of talent and experience” that “is incalculable” (Laslett, 1991, p. 5). This does not have to be the case since there are “things which the elderly can do now—and should do if they possibly can—because no one else can do them” (p. 197). One of these things might include helping create better understand of active aging. Other researchers, such as Partridge (2022), have achieved good results with older adults as “expert researchers.” However, as Fishleder et al. (2016)

observed, “Older adults moving to active planned retirement communities are perhaps a distinct group” (p. 537). It is possible that their priorities may not include co-creation of research, or that unique considerations apply to them in engaging their participation. To what extent does helping researchers fit into the goals of older adults, and how might their involvement be achieved?

### **Purpose of the Methodological Focus**

The methodological purpose was to explore considerations for involving residents of the community as co-creators of research. Involving non-researchers in research can be a challenge and requires careful consideration of how to elicit their participation in ways they find valuable and that are useful to the project (Dorant, 2020).

### **Contextual Focus: Meaning of Activity for Older Adults**

There is considerable societal pressure for older adults to age successfully but little consensus as to what a “successful” old age might look like (Timonen, 2016, p. 4). For many older adults, the primary challenge of aging appears to be determining “what kind of old person” they are (Hazan, 1992, p. 65). Successful aging is often portrayed as “active, engaged, and healthy” (Huijg et al., 2017, p. 234). These qualities can be achieved in various ways. “Leisure” is a frequent focus for those at or approaching retirement age, but it can result in lack of purposes and “meaningful engagement” (Rowe & Kahn, 2015, p. 595). Older adults are often urged to find fulfilment in volunteer or caregiving roles (Morrow-Howell & Wang, 2013). These roles can help older adults avoid having their productivity questioned, as individuals “no longer participating in paid work” (Dosman et al., 2006, p. 403), and helps them avoid appearing disengaged due to “reduced ability to engage in meaningful activity” (Smith et al., 2018, p. 14).

Activity theorists have made compelling claims for the benefits of “productive” or “meaningful” activities (e.g., Boudiny, 2013; Burr et al., 2007), which provide further motivation. But what does it mean to be “active?” The term appears almost meaningless. There

is hardly any such thing as an “inactive” person—even those with quadriplegia *do* things (e.g., Tada, 2010). Our survival depends on a certain amount of activity, and anything beyond the most basic survival requires more than that. However, it is unlikely that an individual who uses the descriptor “active” means attending to basic chores. Being “active,” implies participation in actions that are valued and admired, both by oneself and by others.

Successful and active aging have been proposed as models to which older adults are encouraged to aspire, as part of what Estes (1979, as cited in Timonen, 2016) labelled the “contemporary aging enterprise” (p. x). One problem is that there is no consensus on what “successful” aging is (Timonen, 2016), but the concept seems to rely on meeting the expectations of a society intent on “transforming the old person into the total consumer, making him into a person whom we teach how to pass away the time decently while he waits for his own passing—death” (Fromm, 1984, p. 131). Despite the emphasis on “successful” aging in many studies, Coleman and O’Hanlon (2017) argue that there is “comparatively little research on attitudes toward the positive and potentials of later life, rather than their constraints” (p. 94). Furthermore, there is little consensus about how “activity” is defined (Menec, 2003).

### **Age-Restricted Active Adult Communities**

Older adults themselves appear to accept active aging as a desirable model. This may be particularly true for those who have elected to live in communities with a focus on activity. These community often avoid the term “retirement” to emphasize an active lifestyle (Katz & McHugh, 2010). They also consist of a sizeable population that has not yet retired (Becker, 2001), with 20% under the age of 60 (MetLife Mature Market Institute and the National Association of Homebuilders [MetLife], 2009). These communities can provide an “antidote to negative stereotypes of older age as a period of decline in physical and social competencies”

(McHugh & Larson-Keagy, 2005, p. 252). While the houses in these communities “have become increasingly upscale” (Glass & Skinner, 2013), the associated lifestyle is often the main selling point, with buyers choosing “lifestyle, not housing” (Cecilian, 2001, p. 124). In some cases, this lifestyle is almost aggressively active. Sixty-four percent (64%) of participants in a Florida study said they were more social, 73% said they were more active, and 86% reported having a better quality of life (Fishleder et al., 2016) than neighbors in nearby communities. “We are busy people” one group of Arizona residents brag (Kastenbaum as cited in Cruikshank, p. 164).

### **Statement of the Contextual Problem**

Retirement communities, master-planned age-restricted communities, and community centers provide activities based on their beliefs about what older adults need and want. Because no individual or organization exists outside of the culture in which it is formed, it is likely that activities are chosen as the result of beliefs about what older adults *should* need or want—or, perhaps, what they can be sold (Katz, 2005). Of course, older adults are not a homogenous group (Lowsky et al., 2014), with age stratification being the only thing many of them have in common. Despite the diversity, older adults generally report that they enjoy being “active.” What we did not know was how they define “activity,” what it means to them, or which activities they prefer. During this study, I encouraged older adults to define “activities” and to articulate *why* it is important and *how* important it is. Do older adults, for instance, believe that they must be “active”? To what extent does an active adult community encourage a more active lifestyle?

### **Purpose of the Contextual Focus**

The purpose of the contextual focus of the study was to describe and understand the meaning of “activity” for residents of a 55+ active adult master planned community and to understand which types of activities they prefer.

### **Theoretical Framework: Impression Management**

The ideals imagined for older age creates a kind of utopia, which can “serve as a screen on which to project our values” (Etzioni, 2000, p. 188). People like to create positive impressions of themselves to others (Vallacher et al., 1992), and typically engage in actions that “cause desirable images to stick” both in the minds of others and in their own minds (Blanton & Christie, 2003, p. 117). As Tedeschi and Riess (1981) puts it, “Impression management consists of any behavior by a person that has the purpose of controlling or manipulating the attributions and impressions formed of the person by others” (p. 3). According to Blumer (1969) a person “can act toward himself as me might act toward others” (p. 79). He “takes pride in himself, argues with himself, tries to bolster his own courage, tells himself that he should ‘do this’ or not ‘do that’” (p. 79). A person can be impressed with themselves or disappointed with their behavior. They can take actions to make themselves feel better or to make themselves appear better. For instance, impression management is evident in this example, reported by Roth et al. (2012) in which most residents in a 55+ active adult master planned community presented themselves as “very active and busy,” “remarkably fit,” “not sickly,” and “very with it” (p. 193). Many claimed to be busier than ever, with one boasting, “Our kids can’t keep up with us!” (p. 193). Cruikshank (2009) takes a different attitude, writing, “Activity and engagement differ from busyness in being more mindful and allowing space for inactivity and reflection” (p. 164).

### **Description of this Study**

This instrumental case study (Stake, 1995) focuses on one 55+ active adult master planned community located in the western region of the United States. In the study, I investigated both co-creation of research with a group of older adults as a methodological issue and the meaning of activity for older adults living in a 55+ active adult master planned community as a contextual issue. As co-creators of research, 17 participants gave opinions about



helping researchers do research. They were involved as gatekeepers and in making suggestions for questions to be included on a survey for the community. Some reviewed drafts of the survey, offering suggestions, and helped to disseminate the survey to other residents. The survey received 57 responses.

The sixteen participants provided insight into the meaning of activity for those living in a 55+ active adult master planned community by completed a two-week activity journal, participated in an interview ranging from 35–100 minutes that covered reasons for choosing to live at Sequoia Heights, descriptions of the things participants do, how they define “activity,” how they think about retirement, how the community contributes to an active lifestyle, and how the COVID-19 pandemic affected their activities. Most engaged in a favorite activity with me, allowing me to experience the kinds of things they like to do and providing an avenue for less formal conversation. Activities ranged from meals in restaurants to walks to learning to knit and making beer. They typically lasted 1-2 hours, with beer-making lasting for more than 5 hours. Altogether, I spent an estimated 30 hours doing activities either directly with participants or activities suggested by participants when they were unable to join me.

After reviewing activity journals, conducting interviews, and participating in activities, I compiled a comprehensive list of all activities reported by participants. These were separated into 10 categories which were approved by participants, some of whom provided feedback on the categories. Suggested survey items, as well other relevant items, were made into a survey intended for anyone living in Sequoia Heights. Interview participants gave feedback on the survey. When it was finalized, they disseminated it to the community through a Qualtrics link.

### **Research Questions**

- Q1      What are methodological considerations when involving residents of a 55+ active adult master planned community as co-creators of research?

- Q2 How do residents of a 55+ active adult master planned community experience “activity”?
- Q3 Which activities do residents of a 55+ active adult master planned community prefer?

The first research questions acknowledges that older adults have experience that can be an asset to the research process. Participants provided varied opinions about involvement as co-creators of research. These opinions, along with their involvement in gatekeeping, survey review, creation, and dissemination, pointed to opportunities and barriers engaging residents of 55+ active adults master planned communities as co-creation of research.

The second research question identifies a construct (activity) and asks how it is experienced. This is another way of asking what it means when put into practice. What does it look like? Like many such terms, “activity,” along with descriptive labels such as “active,” is frequently used with the expectation that it is understood in the same way by everyone. Grant (2019) notes that, “Findings don’t have to be earth-shattering to be useful” (p. 8). The very seemingly obvious notion of activity as a concept that “everyone” understands suggests that it is ripe for further consideration.

The third research question examines which “activities” residents of the 55+ active adult master planned community prefer. Activities identified in in participant journals led to the identification of 10 categories of activities experienced by residents. All participants had the opportunity to review the categories. They were included in two items in a survey completed by 57 individuals living in the community. One item asked participants to indicate which activities they did most often while the other asked which they most enjoyed. A summary of rankings is included. The impact of the recent COVID-19 pandemic is likely to have had an impact on how

older adults have recently experienced activity (Hill et al., 2020). This, along with other considerations, is discussed in Chapter 5.

### **Summary of Chapter I**

In this chapter I have reviewed the concepts of active and successful aging and observed that they go largely unchallenged both in society and in scholarship, with the exception of those engaged in critical gerontology (e.g., Estes, Timonen, Weil). I have examined the concept of “activity” and its meaning for older adults themselves, highlighting the lack of research on this specific definition of an “active adult.” I have described the instrumental case study, which focuses on involving participants as co-creators of research in the context of a 55+ active adult master planned community and the meaning of activity for the residents there.

In Chapter 2, I look at previous ways older adults have been involved both as participants and as co-creators of research and best practices recommended by other methodologists. I also discuss the contextual aspects of the meaning of old age and retirement; youth-oriented culture and ageism; performance of age; active and successful aging, the meaning of activity for older adults, and age-restricted retirement communities. In Chapter 3, I describe my researcher stance, epistemology, and theoretical framework, along with methodology, sampling, context, methods, research procedures, analysis, trustworthiness, ethical considerations, and representation of findings. Chapter 4 details both the methodological and contextual findings. Chapter 5 provides discussion of the findings and implications of this study and suggestions for additional research.

## CHAPTER II

### REVIEW OF LITERATURE

In this research study, I considered both a methodological question and two contextual questions. Methodologically, I investigated older adults' attitudes toward co-creation of research and how to involve them in this capacity, enabling them to use their considerable expertise toward investigating issues that are of concern and interest to them. Contextually, I examined how older adults define and experience "activity" and which activities they prefer. In this chapter, I look at previous ways older adults have been involved both as participants and co-creators of research and best practices for involving this population recommended by other methodologists. I also provide an overview of the literature on meaning of old age and retirement, youth-oriented culture and ageism, performance of age, active and successful aging, the meaning of activity for older adults, aging in place, age-restricted retirement communities, and the impact of the COVID-19 pandemic on older adults' activities.

#### **Involving Older Adults as Co-Creators of Research**

How often are we truly able to define our own meanings, outside of the collective culture or society in which we live? Beckett (1953, as cited in Tubridy, 2018, p. 68) wrote, "It's of me now I must speak, even if I have to do it with their language." Bracken (2017) further underscored the limitations of language, noting that "everything is 'made of words' but always 'others' words" (p. 358). The field of semiotics points to how people make meaning, primarily through "signs" (Peirce, 1931–1958). These can be words or images, activities or things, but they only develop meaning (becoming signs) when humans give them meaning. Saussure (1916/1983)

distinguished between a *signifier*—such as the word “old” and the *signified*—what we think it means to be old. It goes further still. According to Lacan (1989), meaning is made not only as a result of the relationship between the signifier and the signified, but through the signifier’s position relative to other signifiers. Old, for instance, relative to young.

Although older adults have amassed years of important contributions to society, they are still the focus of negative and damaging attitudes (Coleman & O’Hanlon, 2017). This is both unnecessary and demonstrates a lack of insight; older adults in many cases have vast professional experience that they can contribute in various ways. One way of addressing the under-utilization of older adults is by including them “as partners” in research, “to be consulted first through interviews, focus groups or with full representation as consultants” (Coleman & O’Hanlon, 2017, pp. 94–95). Stuen and Kaye (1990), for instance, reported on the contributions of retired university faculty that “utilized a vast, untapped reservoir of expertise” and “provided a valuable community service as well” (p. 25). While companies are struggling to find workers, older adults remain an untapped source of potential (Fuller et al., 2021). Despite the many reported benefits to involving people in research affecting their lives, Blair and Minkler (2009) point out that older adults are rarely included in research as “prominent partners” (p. 651). Corrado et al. (2020) observed that older adults do not tend to participate in determining the research question, have opportunities to learn research skills, and “have little opportunity . . . to guide the data collection process” (p. 421).

Most studies involving older adults in research creation have been done in areas like healthcare (Fudge et al., 2007), and, more recently, in technology (Battersby et al., 2017). The method has not been traditionally well-used in gerontology (Fortune et al., 2015), but the field is increasingly moving toward involving older adults in research creation (Goulding et al., 2018).

Weil (2015) argues that “older persons should be seen as stakeholders” (p. 725) and actively participate in study design. Research design without the inclusion of older people is what Ross et al. (2005) call “cake without the icing” (p. 274). Forster et al. (2021) cite a “moral imperative to involve individuals and communities who are the focus of research about them” (p. 2). As “insiders” into their own experiences, older people have information—“expertise by experience”—that other researchers do not have (Devotta et al., 2016, p. 664). The “dialogue based on older people’s interpretations of their own lives” brings immeasurable value to research (Walker, 2007, p. 482). Taylor (1971), decades ago, made the argument that researchers cannot construct knowledge about people without their meaning-making, stating, “We make sense of action when there is a coherence between the actions of the agent and the meaning of his situation for him” (p. 13).

### **Participatory Research**

Including research participants of any age as co-creators of research is somewhat new (Fudge et al., 2007) and a variety of terms are used to describe the approach, including “inclusive research,” “user-led research,” “community research,” “participatory action research (PAR),” “collaborative research,” and “co-research” (Forster et al., 2021). Boylan et al. (2019) refer to it in the healthcare setting as “patient and public involvement (PPI)” (p. 721). There is growing enthusiasm for this kind of involvement by those who fund research with the goal “to do research ‘with’ people rather than ‘to’ or ‘for’ them” (Boylan et al., 2019, p. 722). Inviting the participation of older adults in research gives findings more credibility (Thompson et al., 2009), with Forster et al. (2021) stating that “academics increasingly accept that inclusivity may increase the relevance and applicability of the research” (p. 2). Older people are often motivated to participate in research studies as co-creators because of a desire to make a difference

(Littlechild et al., 2015). They also may enjoy the chance to offer insights and to have social interaction (Resnick, et al., 2003).

This study does not specifically take a participatory action research (PAR) stance; my interest is primarily in how to make participation in research attractive for older adults. They will not, in this case, have had the opportunity to select the topic, for instance. They will not be conducting interviews or doing too much “heavy lifting”—one of my concerns being “minimizing research burden” (Jacelon, 2007, p. 66) at this stage. One downside to involving participant researchers can be exploitation if they are asked to do too much (Charmaz, 2011). However, there are aspects of the PAR method that are relevant for the inclusion of older adults even in a study such as mine. PAR can be seen as a counterpart to researcher-directed studies. It is “systematic investigation with the participation of those affected by an issue for purposes of education and action or affecting social change” (Green et al., 1995, p. 2).

One PAR study that is especially relevant to my own work was Glanz and Neikrug’s (1997) research that allowed older people worried about how they might age to develop a research question centered around the characteristics of active “old-old” people.” These participant-researchers interviewed participants and created a survey whose results were compared with those from other research studies. Another relevant study (Dickson & Green, 2001) was outside-researcher-led with substantial contributions from older participant-researchers who helped create interview guides and consent forms and conducted secondary analysis of findings. Scharf et al. (2016) identified themes relevant to older adults and helped them create individual community projects.

## **Barriers to Older Adults as Co-Creators of Research**

While the benefits of an inclusive researcher involving older adults are largely acknowledged, the relatively recent nature of their inclusion leaves many questions about how best to involve them in ways that they find meaningful and that use their knowledge and skills to best advantage. This is not always entirely successful. Buffel (2019) reports that older adults' perspectives, even when in the role of co-researcher, are often neglected. Similarly, Littlechild et al. (2015) point out that most research studies "are conducted by academic researchers who tend to emphasize the positives based on retrospective narrative accounts, rather than critically appraising" the effects of the participants (p. 19). In other words, they focus on the outcomes and not how participants have contributed to the findings. Previous research demonstrates that including participants as co-creators of research "does not unproblematically guarantee better data, improved understandings, democratizing processes within communities or power-free relations between academic, communities and statutory bodies" (Roy, 2012, p. 15). Unfortunately, not all communities are equally represented as co-creators of research, and those with language barriers or health issues are particularly unlikely to have this opportunity (Fudge et al., 2007).

Unfortunately, most research studies that assess the value of the contribution provided by older adults as co-creators in the research process offer only anecdotal evidence, with few providing a formal evaluation (Fudge et al., 2007). These evaluations in turn are likely to emphasize the value of participation for the *participants* rather than the research itself (Fudge et al., 2007). Doyle and Timonen (2009) caution against fully accepting what they call the "moral" argument for encouraging co-creation, arguing that it potentially "obscures the practical implications and realities of involvement" (p. 259). For instance, older adults interviewing others



within their own community may find that some interviewees are reluctant to talk openly with people they know (Warren & Cook, 2005). Professional researchers sometimes question whether older adults who are untrained in research have “the skills to pick up on significant issues and explore them in depth” (Littlechild et al., 2015, p. 27). There is always the possibility that participant-centered research will “represent no more than tokenistic consumerism” (Littlechild et al., 2015, p. 31). This is a particular risk in cases where the researchers themselves remain unconvinced of the value of including participants (Snape et al., 2014). One individual was quoted as follows: “In my experience, there are very, very few researchers, scientists, doctors, who really value public input and involvement” (Snape et al., 2014, p. 6). Morse (1998) notes that a certain amount of watering down of the results may be necessary to honor participants’ feelings, and that those who demand more attention are likely to be overrepresented in the findings.

### **Considerations for Including Older Adults as Co-Creators of Research**

Many of the considerations researchers observe in including older adults as co-creators of research are the same as those they might observe when including them as research participants. Participation exists on a continuum (Gutman et al., 2014), with vastly different levels of involvement, but regardless of where older adults fall on that scale, there are certain steps researchers can take to better involve them meaningfully. Weil (2015) points out potential pitfalls in various data collection strategies with older adults, including 1) a dislike for the structure of surveys, with participants wanting instead to “chat” (p. 728), 2) the tendency for younger researchers to impose a certain style (based on ageism) on the interview, and 3) the possibility that participants will answer according to stereotyped views of how they “should” be. Face-to-face interviews can present problems with hearing, vision, and cognitive abilities.

Unfamiliarity with technology and fears about falling victim to fraud (common among older adults) can be barriers for research conducted online. Recruitment, according to Jacelon (2007) can be problematic, since “there is no one place to go, such as school or work” to recruit (p. 65). While I take her point, it seems that community centers, retirement homes, and nursing facilities would offer these kinds of “one-stop shopping centers.” Still, even if older adults can be identified as potential participants, they are not always eager for the opportunity. Older adults, especially those who are married, are more likely to refuse participation (Desrosiers et al., 2009). It is best to recruit through face-to-face contact (Resnick et al., 2003) possibly to better build trust, which is critical for older adults (Jacelon, 2007). Gatekeepers can help researchers gain access (McFadyen & Rankin, 2016), although older adults may still be unwilling to sign consent forms (Feldman et al., 2008).

Weil (2015) recommends that reflexivity regarding methods take place throughout the study, with the researcher often stopping to consider issues such as sensory perception and other physical changes that impact older adults, such as eyesight, hearing, cognition, and memory. She also recommends considering the birth cohort of participants, in which members experience “some general commonalities” with others within the cohort, including certain attitudes and beliefs that are typical for members (p. 727). My grandparents’ generation, for instance, were children during the Great Depression and consequently reluctant to waste anything. Similarly, children living through the COVID-19 pandemic will likely carry certain ingrained attitudes into older adulthood, one day baffling the youngsters.

Measurements and research tools have to be carefully considered and justified for use with older adults. Some measurements are not appropriate for older populations, such as those that rely heavily on memory. Researchers must also periodically assess how well a method fits,

asking questions such as, “How well is the selected method working in getting the data you seek? What aspects of the method work with the particular older population you are studying at that time? Which do not? How can the method be improved during the course of the study?” (Weil, 2015, p. 738). Jacelon (2007) recommends pilot tests to “determine the appropriateness of instruments for older adult population,” taking into account font size, content, and difficulty (p. 72). Language must be carefully considered, especially in survey instruments, to avoid being perceived as “artificial” by older adults (Weil, 2015, p. 738) and surveys must be constructed in ways that allow individuals to describe themselves “from their own points of view” (p. 738). Reflexivity is important for researchers working in all contexts, but especially with older adults. It is important for researchers to carefully consider our role in the research process and how we can best meet the needs of participants (Weil, 2015). Researchers “must be prepared to adapt the study design to the population’s needs (Jacelon, 2007, p. 72).

Wenger (2001) offers specific advice for interviewing older adults, which is particularly relevant to this study, the success of which will rely largely on successful interviews with participants in the first phase. She notes that the group categorized as “older people” is remarkably heterogenous and the reasons researchers choose to interview these particular participants can be varied as well. The oldest older people, as well as those with health conditions or protective relatives are typically under-sampled in most research studies (Wenger, 2001). Gaining access to participants can be a challenge, with some older adults being worried about having a stranger in their home or that the interview will involve a sensitive matter they would prefer not to discuss. In a study such as the one I am doing, for instance, in which respondents report on activities, it is likely that certain activities will be omitted, such as drinking, gambling, and sex (Katz, 2005).

Women, so long as they are not very young women, are generally seen as less suspicious and more likely to be granted access (Wenger, 2001), and “the interviewers with the highest success rates in acceptance by older interviewees are middle-aged or older women with outgoing personalities” (p. 264). This is good news for me. Wenger (2001) notes that for the interview itself, special attention may need to go toward mitigating the effects of sensory impairments, such as poor hearing or eyesight, using proxy interviews for those who need them, and being prepared to double-check certain types of information with those who have cognitive impairments. It is important to consider that everything may take longer than expected when working with older adults. Outside the context of interviews specifically, Hancock et al. (2003) report that older adults fill out surveys much more slowly than younger people, taking as much as four times as long.

I particularly appreciated Wenger’s (2001) recommendation to use clues from the homes of older people to guide discussions—asking about photographs or memorabilia as a way of opening dialogue, for instance. She also recommends making the interview feel like a conversation (good advice no matter the age of the interviewee). Older adults may expect reciprocal information from interviewers—how many children they have, for instance, after they have provided the answer to that question themselves. This kind of reciprocity is important in making respondents feel comfortable enough to disclose information. As discussions deepen, friend-like relationships can result. Some researchers caution against developing friendships with participants, fearing that it will affect objectivity. Wenger (2001), however, writes, “My own inclination is to enter freely into such relationships” (p. 273). The main concern is to avoid influencing behavior through friendship and thereby distorting the data. She also advocates for generosity with time, staying longer for a cup of tea or to see something the participant wishes to

show. “Many older persons may get few opportunities to chat about themselves. They may be lonely, and they may get a boost to their self-esteem by being able to make a contribution” (p. 275). Since neither neutrality nor objectivity are goals of qualitative research, these kinds of interactions are unproblematic.

### **Current Study**

The methodological focus of this study—involving older adults as active participants in the research process—dovetails nicely with the contextual focus of the study, which is the meaning of activity for older adults in an age-restricted active adults master planned community. Both the contextual and methodological components of the study may create an opportunity for those involved, which may prove interesting or beneficial to participants. Participatory research is considered “empowering” (Blair & Minkler, 2009, p. 652) and offers those involved the chance for “co-learning” between researchers and participants. This may be limited to some extent by the older adults’ own interest in involvement—many may not want to be involved in every step of a research project—but “they should have the opportunity to engage as co-researchers in diverse aspects of the work” (Blair & Minkler, 2009, p. 653). There is clearly ample room for additional work on how to incorporate the expertise, perspectives, and values of older adults in research. Co-creation of research involves four stages, according to Leask et al., (2019): *Planning, conducting, evaluation, and reporting*. This study, being largely exploratory, did not involve co-creators in all four stages.

### **The Meaning of Activity for Older Adults in a 55+ Active Adult Master Planned Community**

A review of selected literature regarding old age and retirement, youth oriented culture, performance of age, well-being, active aging, and successful aging; importance of activity for

older adults, choice of where to age, activity in age-restricted communities, and the impact of the COVID-19 pandemic on activity for older adults are covered below.

### **Old Age and Retirement**

Aging does not exist in isolation. Rather, “society shapes the meaning and experience of aging (Kunkel & Settersten, 2021). In other words, no one ages outside of a context, a social context at that—in the company of other people and within the meaning that one’s society has constructed around the phenomenon. It is therefore essential to address how old age and retirement are understood in the culture of the United States and the Western world, one that is guided by issues of race, gender social class, and age (Minkler & Estes, 1999). These also guide our understanding of retirement, where conversations often revolve around “public spending” (Estes, 2001, p. 7) for those without adequate resources. Self-interest often drives the societal impulse to “empowering” older people, by those for whom empowerment removes responsibility for an aging population (Katz, 2005).

### ***Old Age***

What do we mean when we talk about old age or aging, especially when “the difference in age between the youngest and the oldest old may be more than 30 years?” (Jacelon, 2007, p. 65). Western society, and the United States in particular, tends to be youth oriented, with many people aiming to look younger than their actual age and sometimes using plastic surgery to maintain a youthful appearance (Berger, 2017). Coleman and O’Hanlon (2017) point to a “simplistic perspective of the lifespan as a ‘rise and fall’ [that] is deeply embedded within Western culture (p. 9). Since there is no physiological definition of “old age”—most Western societies use the rather arbitrary “retirement” or “pension” age, ( typically 60–65) to signify this stage of life. Questions regarding the validity of this approach aside, using retirement age as a proxy for old age is simply “convenient” (Roundtree, 1947, as cited in Roebuck, 1979). A recent

trend in gerontology has been to redefine old age, noting that using the designation as the age at which people can receive state benefits is no longer relevant (Weil et al., 2017). Those experiencing “old age” are diverse, including “some of the richest and most powerful and the poorest and most excluded; those fit enough to run marathons in their eighties . . . and the most frail” (Thane, 2010, p. 33).

Previous definitions of old age were typically assigned to those who were “infirm, frail, and suffering incapacities of body or mind . . . and who also gave the appearance of being old” (Roebuck, 1979, p. 417). Old age was seen as a combination of both years of life independence, with the “chronological age at which this conjunction” occurred varying greatly and making “old age” a difficult concept to precisely define (Roebuck, 1979, p. 417). It clearly makes little sense to refer to a thirty-year-old individual with limited mobility as “old” or a marathon runner of 75 as “young.” Age has a meaning that goes beyond physical ability or lack of ability, frailty versus robust good health. It also has tremendous potential to divide and categorize people: “Age, more than any other criterion, sets the elderly apart from society” (Haber, 1985, p. 1).

Western society identifies older people as a unique group while simultaneously denies that aging exists (Andrews, 1999). Gilleard and Higgs (2013) note that aging is perceived differently than it once was. The popular phrases, “X years old is the new Y years old” or “You’re only as old as you feel,” or “she’s 80 years young,” demonstrate the way aging has been redefined and often rejected (Jeske, 2016, p. 328). This tendency is not without consequences. Bytheway (2000) summarizes the argument against acknowledging age as, “people do not change, they remain the same; but they can continue to develop; but there is a massive diversity; so we must not generalize about age or prejudge older people” (p. 781). There are obviously inherent contradictions in these statements that underscore societal unease with aging. One

woman in a documentary film cited by Scheidt (2020) observed, “Our society isn’t saying you can’t get old. It’s saying you can’t age” (p. 1377). Many older adults fear being seen as old or ill—or a combination of both (Roth et al., 2012). Laslett (1991) wonders why, when we have managed to extend our life expectancy so dramatically, enabling us to “realize the full potential of human experience for the first time in history, we have taken fright” (p. 1). Thomas (2004) claims that the “denial of aging” rather than aging itself causes most of the problems associated with old age (p. 200).

Maybe there is good reason for alarm. Laz (1998) sees age as “potentially omnirelevant” (p. 108), meaning that it affects and is owned by all people regardless of their chronological age. She recommends a “focus away from ‘the elderly’ to broader social processes that affect people in multiple age categories throughout their lives” (p. 109). Age is often used as an explanatory variable when we could instead ask about the social forces that cause us to see connections between age and various other traits, such as voting behavior (Riley, 1987). This creates adversarial situation. Instead of looking at age in a community-oriented, “we’re all in this together” fashion, Western culture tends to view it as an “individual attribute,” and therefore “the property of older people” in the same way that race is the property of non-Whites and gender the property of women (Laz, 1998, p. 95). Rather than thinking of aging as something that we will all experience and therefore all have an interest in, we put the burden directly on older adults to determine what aging means while lacking the ability to overturn cultural beliefs and structural realities that govern the way we live.

Older adults, as they are increasingly called (although Samuel, 2017, makes a claim for a variety of other terms, such as “seasoned citizens,” “welllderly,” and “superadults,”—not to mention “Geezers”) are a large group and one that is increasing in size. Vincent and Velkoff



(2010) predict that twenty percent of the population will be at least 65 years of age by the year 2050. But the group, defined by age, is also “marked by unparalleled diversity” (Seltzer & Yahirun, 2013, p. 1) that still remains poorly defined, “a vague terms” (Enßle & Helbrecht, 2021, p. 2396). Laslett (1991) distinguishes between the Third Age and the Fourth Age in older adulthood, the first of which is characterized by good health and an active lifestyle—a period he believes should be utilized for the greater good; the latter by physical and cognitive decline. Neugarten (1974) found it helpful to differentiate between the “young-old” who are “approximately 55 to 75—as distinguished from the old-old, who are 75 and over” (p. 191). These distinctions are helpful when thinking about what we mean by age, even if they do not offer a complete understanding of why age matters as much as it does, nor do they provide a full description of the strengths and weaknesses of any one individual.

### ***Retirement***

If a precise definition of “old age” is lacking, finding one for retirement is even more problematic. Weiss (2005) notes that, “Defining retirement can be surprisingly difficult” (p. 1) and goes on to describe the three primary ways the concept is approached. These are: 1) *economic*—one is considered retired if he or she is past their mid-fifties and no longer employed; 2) *psychological*—one “has established a retirement identity” (Weiss, 2005, p. 2); and 3) *sociological*—one is retired if other people accept them as retired. Yet there is ambiguity in these classifications, and one may be considered “retired” according to one definition but not another (Weiss, 2005). A reasonable definition of retirement is the time when people have stopped full-time paid employment and additionally self-describe as “retired” (Doshi et al., 2008). Most Americans have a perceived window of time during which retirement is acceptable and even expected; this typically falls between the ages of fifty-five and sixty-five (Weiss, 2005). Traditional retirement, and by extension old age, can be divided into two distinct phases, what

Laslett (1991) termed the Third and Fourth Age. The Third Age begins at retirement and is generally positive for many people, consisting of reasonably good health and an active social life. In fact, Laslett (1991) considered it to be a period of great personal satisfaction, which he termed the “crown of life” (p. 144), since individuals at this stage can continue to be active despite no longer working and may feel younger than they are chronologically. The Fourth Age is usually associated with both physical and cognitive decline and is consequently less positive.

Retirement is no longer a short period of life, in most cases. People spend an average of 14 years (about 20% of their lives) as retired individuals, in contrast with earlier generations who spent only about a year in this stage of life (Seligman, 1994). Nearly three quarters of white males over the age of sixty-five were working in the late 1890s and the expectation was that they would work until they were no longer able (Graebner, 1980). Even now, “retirement” is experienced differently by different individuals. There are four major “modes of experiencing the transition to retirement,” according to Hornstein and Wapner (1986, p. 189): 1) transition to old age, 2) new beginning, 3) continuity, and 4) imposed disruption. Other ways of thinking about retirement include *economic theory*, or the idea that most people are happy to retire as long as they have enough money (Feldman & Beehr, 2011). *Identity theory* looks at how people approaching retirement age think about themselves, and how important their identity as a worker is to their sense of self (Feldman & Beehr, 2011). *Continuity theory* emphasizes the way peoples’ lives either change or stay the same over time. (Atchley, 1999). *Role theory* emphasizes how people conform to societally dictated roles that tell them who and what they are supposed to be at any given time, including when to retire (Biddle, 1986). *Crisis theory* proposes that retirement is a “major transition that has the possibility of becoming a crisis (LaBauve & Robinson, 1999, p. 6).

In most Western countries, “retirement” is seen as a reward for a lifetime of work, and a chance to be free from previous obligations (Luborsky & LeBlanc, 2003). This would be in line with the “new beginning” model, in which people reinvent themselves (Gee & Baillie, 1999). It is more typical for retirees to continue on as they previously had, perhaps with some additional free time (Gee & Baillie, 1999), reflecting Hornstein and Wapner’s (1986) *continuity* model. And while many older adults see retirement as a form of freedom (Repetti & Calasanti, 2017), this is not a universal experience. “Retirement” often causes people to experience “loss of their occupation and their membership in its community” (Weiss, 2005, p. 5). Furthermore, one of the major non-financial factors leading to retirement is poor health (Wang & Shi, 2014), which can create unpredictability and stressful. Wang and Shi (2014) recommend psychological planning for those facing retirement to provide the best transitional experience.

This transition does not always involve a clean break from work. Many people officially “retire” from their careers and went on to work in other capacities (Parker, 2022). This could be a result of an inability to conceive of life without work or structure. Some feel pressured to retire before they are ready (Walker & Maltby, 2012), while others keep working because they lack sufficient financial resources to make retirement feasible (Weiss, 2005). Continuing work after formal retirement is known as “bridge employment” and is increasingly common (Zhan et al., 2009). Clearly, retirement is a varied experience onto which individuals place their own meaning, both through cultural understandings and personal experiences.

### **Youth-Oriented Culture and Ageism**

While there are various ways to interpret old age and the period of life commonly thought of as “retirement,” these are most meaningful in the context of a culture that tends to privilege youth over old age. Biggs (2004) writes, “One can take on any identity, except aging” (p. 49). In

a society that values youthfulness in appearance, action, and attitude, this observation is all too accurate. Lawrence R. Samuel, in his book *Aging in America: A Cultural History* (2017), states that the culture of the United States is “perhaps the most youth-oriented culture in history” (p. 2), with people of all ages showing a preference for younger people (Chopik & Giasson, 2017).

This emphasis on youth began increasing in the early 1900s (Lin & Bryant, 2009) and implies a corresponding aversion toward old age that has been labeled *ageism*, a term coined in 1969 by Robert Butler, a physician (Achenbaum, 2015). Ageism can be explicit or implicit, with the latter condition defined as “thoughts about the attributes and behaviors of the elderly that exist and operate without conscious awareness, intention or control” (Levy & Banaji, 2002, p. 51). Race and gender have both been long understood to be social constructions, and it is likely that age is a similarly constructed characteristic, which “gains its meaning in interaction and in the context of larger social forces” (Laz, 1998, p. 86). Despite its recognition as an *-ism*, ageism receives less attention than is paid to racism or sexism (Nelson, 2005). It is nevertheless a “stigmatized identity in western cultures” (Day & Hitchings, 2011, p. 886), with most people hoping to avoid the label “old” if possible (Rozario & Derienzis, 2009). The COVID-19 pandemic brought “blatant displays of ageism” that clearly demonstrated how little valued older people are in many communities (Monahan et al., 2020).

Aging means becoming “discredited” (Goffman, 1963), bringing both lower status and negative stereotypes, such as “infirmity, dependence, old fashioned attitudes and tastes, mental and physical slowness” (Day & Hitchings, 2011, p. 886). Even those fortunate enough not to have yet been part of a group targeted for discrimination based on characteristics outside our control have only to “wait a couple of decades” (Robbins, 2015, p. 6). Cultural ideas about aging are reflected in the beliefs that being “old” is synonymous with “frailty, poor health, or failing

cognition” (Roth et al., 2012, p. 197). This is evident in many media portrayals of old age.

Woodward (2006) offers the 2002 film *About Schmidt*, starring Jack Nicholson, as an example of the kind of ageist stereotypes that are common in United States culture, with Schmidt at the age of sixty-six represented as old physically, socially, culturally, and psychologically.

Stereotypes about aging are learned at a young age—as early as four (Levy et al., 2002)—and a higher proportion hold ageist views than racist or sexist views (Banaji & Hardin, 1996). Palmore (2001) reports that almost 80 percent of older adults (60+) responding to a survey about ageism said they had received negative treatment because of their age. Ageism has profound impacts on health outcomes for older adults (Chang et al., 2020). Berger (2017) writes that, “older people have had to face an escalating level of disregard, disrespect, and marginalization” (p. 184). These negative perceptions are not healthy. Levy et al. (2002) found that older adults with positive self-perceptions regarding aging lived 7.5 years longer than those harboring negative self-perceptions of aging. Of course, it could be that those with positive ideas about aging feel this way because of superior health; however, some research indicates that optimistic attitudes can affect certain health measures (e.g., Achat et al., 2000).

Fiske (1993) notes the far-reaching implication of stereotypes, writing, “In short, stereotypes exert control” (p. 621), dictating “how certain groups should think, feel, and behave” (p. 623). Further to this point, Laz (1998) confronts age as an issue of control, noting that aging “is never accomplished outside of relations of power” (p. 109). This power is seen in the way stereotypes tend to remain fixed (Hamilton et al., 1990). They are also generally focused on groups with characteristics thought to be undesirable, and the derogatory labeling describing them is used “as a means of social control” that causes those labeled to be “perceived as exemplars of the label rather than as unique entities” (Ashforth & Humphrey, 1997, p. 49). Many

stereotypes are automatic and made despite attempts to avoid them and despite explicit beliefs (Banaji & Hardin, 1996).

Ageist attitudes in the United States can be complicated. Younger people tend to have mixed impressions of older adults, often seeing them as simultaneously “incompetent” and “warm” (Lin & Bryant, 2009, p. 420), a finding which may bring some small comfort to older adults. Younger generations, such as present-day Millennials, can also be the victims of ageism, evidenced by their frequent portrayal as “self-absorbed narcissists” (Tréhu, 2017, p. 534). However, Fiske’s (1993) examination of power might lead to the conclusion that these stereotypes are less damaging since younger people in a youth-oriented society are not a stigmatized group. As Fiske (1993) puts it, “. . . even if underlings do stereotype, their beliefs simply exert less control than do those of people in power” (p. 623).

The stigma attached to old age exists even in the most unlikely of places—age-restricted housing communities. This is consistent with the finding that older adults themselves may find it easier to self-stigmatize than to admit that “they have been designated, through ageist acts, as members of a stigmatized group: the old” (Levy, 2001, p. 578). They may also exhibit prejudice against people older than themselves as a way of differentiating (Bodner, 2009). Roth et al. (2012) conducted fieldwork in an active adult retirement community (AARC) comprising several thousand individuals on the east coast of the United States. This community experienced conflict between the different age groups eligible to live there, with younger “Baby Boomers” showing disdain toward the older residents. During a community meeting at which older residents invited new members to get involved with activities and leadership, one new member responded, “We didn’t come here to hang out with people old enough to be our parents” (p. 190). But age alone was not necessarily stigmatizing—not if a resident was still perceived as “active.” Even poor

health was not necessarily a reason for a resident to be excluded from the social life of the community, at least not if “the person had not ‘given up’ and remained socially engaged” (Roth et al., 2012, p. 196). This might be one reason older adults are motivated to age in ways that are socially acceptable, displaying the right attitudes and engaging in the types of actions that give the appearance of vigor.

### **Performance of Age**

Laz (1998), writes, “We all perform or enact age; we perform our own age constantly, but we also give meaning to other ages and to age in general in our actions and interactions, our beliefs and words and feelings, our social policies” (p. 86). Just like gender, which we tend to assign to individuals based on easily observed (rather than genital or chromosomal) characteristics, age is similarly assigned based on expectations of how an older or younger person *should* look (Laz, 1998). “We do not ask to see a birth certificate or some other ‘proof’ of chronological age before we categorize and treat an individual as a child, an age peer, an elder” (Laz, 1998, p. 93). Individuals are expected to perform their roles in socially accepted ways. For older adults, these often focus on appearance, health, activity level, and cognitive functioning (James et al., 1998). Most people act out their age in ways that are “predictable given the particular context,” making age seem “invisible” and “natural” (Laz, 1998, p. 100).

If acting appropriately as an older adult seems a relatively simple task, it is in fact fraught with contradictions and involves the performance of a fine-balancing act. In many ways, attitudes toward older adults are reminiscent of the “Mommy Wars,” in which both women who choose to devote their lives to full-time motherhood and women who combine motherhood with a career battle about which is the better choice. (Never mind those women who do not choose to have children at all.) The actions of older adults are framed as “choices” much in the same way that mothers are assumed to make “choices” about mothering, when their choices are constrained

by social realities (Crowley, 2015). Choices for older adults are also constrained. While successful aging is presented as “a set of choices that anyone can (and should) make” (Timonen, 2016, p. viii), it is “clearly an all-consuming, expensive project” restricted to those who can afford it (p. ix). “Old people find themselves barred from paid employment, dismissed as mere consumers of leisure and trivia if they have money to spend and derided as burdensome dependents if they do not” (Calasanti & King, 2020, p. 12). Like Goldilocks of the children’s story *Goldilocks and the Three Bears* (Southey, 1837), an older person must find the performance of age that is “just right.” This can be a hard performance to manage, given that, “The public expects people to totter ever so slightly as they get older” (Havighurst & Albrecht, 1953, p. 36), while also seeming generally physically and mentally competent,

Western culture has something of an attachment to the middle ground, the “just right” choice that is neither too much of one thing nor too much of another. Christopher Booker (2004) writes of the three choices often presented in traditional tales: “the first is wrong in one way, the second in another or opposite way, and only the third, in the middle, is just right” (p. 231–2). Finding this middle ground may not be particularly easy when it comes to behavior. Jackson and O’Neal (1994) point out the difficulty of performing this balancing act, and note that “the body serves as a vehicle for the communication of nonverbal messages” (p. 8). Accordingly, older women use “appearance management activities to ameliorate the effects of growing old” (p. 14), while women who try to appear young are also stigmatized (Dumas et al., 2005).

One way that older people may try to manage the impression they give is through their behavior. Hazan (1992) describes the way residents of an Israeli nursing home performed the concept of “functioning,” knowing that they were judged by how they managed to accomplish various tasks; being considered “able-bodied” is one of the ways in which older people are



afforded status over those who are “bedridden” or “infirm” (Zilberstein, 1967, as cited in Hazan, 1992, p. 6). The ability of the “able-bodied” to “visit their families and friends, sleep outside the home on occasion, shop, and take part in social and recreational activities being held in town” (Hazan, 1992, p. 17) was one way that residents were ranked. Activities were particularly valued if they took place away from the institutional context, demonstrating a connection with the outside world that indicated “social gifts” rather than inclusion as a mere result of being a resident of a nursing home (Hazan, 1992, p. 35). Needing to seem functional appears to have affected the residents’ behavior in a variety of situations; even when ill “some try to present a welcoming face, declaring how well they feel and their certainty of a quick recovery” (Hazan, 1992, p. 53).

Stryker (1980) suggests that activities that reinforce role dynamics allow older adults to receive feedback from peers about how well they are playing their roles and about their general self-worth. As Hepworth (2000) puts it, “Each individual constructs his or her own vision of age identity from the expectations of others” (p. 50). This identity is not always easy to achieve, or even to identify. Gergen (1991) argues that in the postmodern world people face so many choices that the number of potential selves they could inhabit can become overwhelming, causing a loss of identity rather than helping to form one. As an example, “older citizens are encouraged not just to dress ‘young’ and look youthful, but to exercise, have sex, take holidays, socialize in ways indistinguishable from those of their children’s generation. There are no rules, only choices” (Blaikie, 1999, p. 104). As Schwartz and Cheek (2017) put it, “too much choice can paralyze rather than liberate” (p. 107). This kind of paralyzing choice can even extend to the decision of how to respond to a given role. Goffman (1961) draws a distinction between embracing a role and distancing oneself from it. In embracing a role, the individual completely becomes that role.

Those who distance themselves from a role may pretend to be engaged but are psychologically removed (Goffman, 1961).

Roth et al. (2012) reported that the most respected members of the AARC they studied were those who were “physically and mentally fit” (p. 193). Many intentionally tried to cultivate friendships with younger people and were eager to attract younger residents to the community, going so far as to update the clubhouse to make it more attractive. This extended even to the kinds of activities on display. “Nobody wants to see a bunch of old white-haired people out here playing cards,” one resident said (p. 193). Some wanted to avoid ramps or grab bars that they feared would give the impression of dereliction. They were partly concerned about property values, noting the need to continue to attract people at the lower age limit (55), which they felt might not be possible in a “community that only has 90-year-olds in it” (p. 194). Significant stigma was attached to any resident with physical or cognitive limitations.

The avoidance of appearing “old” can have serious implications. At one AARC, a community health organization was formed to help residents age in place, but since it was financed by dues-paying members, it ran into problems; many residents refused to accept that they would ever need these kinds of services (Roth et al., 2012). Avoidance of acknowledging age can also effectively wipe out the richness of one’s own past life, and the meaning of experiences. Thomas (2004) notes that wrinkles “are the sum of all the days we have lived and will never live again” (p. 10). Perhaps that is part of why some older adults feel the need to perform an idealized version of themselves. “It shocks us to see ourselves . . . as paper and not the pen we imagine ourselves to be” (Thomas, 2004, p. 10). Given the powerful reasons older adults have to try to avoid taking on the negative aspects of aging, it is not surprising that Western culture has developed ways to approach the issue, making it seem like a situation that

can be managed and even conquered. As a potentially stigmatizing quality, it is likely that those experiencing old age may try to enact measures of “self-presentation” and “impression management” (Goffman, 1959), to manage “how others see them” (Neves et al., 2019, p. 76).

### **Well-Being, Active Aging, and Successful Aging**

While there are certainly many ways to look at aging from a scholarly perspective (Joyce Weil’s chapter “Gerontological Theoretical Approaches” in *Research Design in Aging and Social Gerontology*, Weil, et al., 2017, covers many of them) as well as a lay approach, one aspect of aging appears to be certain in modern Western society: There are many opinions on how best to accomplish it. One prevailing idea is that aging must be done “well,” with plenty of engagement, activity, purpose, and meaning. The World Health Organization (WHO) lists “aging well” as a global health priority (Appau et al., 2020), and “aging well in later life is a key strategy of public health policy in many developed countries” (Jivraj et al., 2014). Aging well seems to comprise achieving a high level of well-being, in addition to remaining physically and cognitively healthy and engaging in purposeful and meaningful activity. These combined characteristics seem to represent a “successful” approach to aging, which places an emphasis on “achieving and maintaining physical and mental health” and takes a positive attitude toward envisioning old age (Calasanti & King, 2020, p. 1). I will briefly describe well-being, active aging, and successful aging to show the interconnected nature of the concepts.

#### ***Well-Being***

Well-being is a loosely defined concept that can be measured both objectively and subjectively (Appau et al., 2020). Objective measures might include financial, work, and physical health indicators (Appau et al., 2020). Subjective well-being, the more common measure, relies on the subject’s own view of his or her well-being (Lucas, 2016) as well as

constructs such as satisfaction or self-esteem (Zhang et al., 2020). For some scholars, well-being refers to “freedom from disability while others use it to refer to perceptions of life quality” (George, 2010, p. 331). Jivraj et al. (2014) identify three general ways of measuring subjective well-being: *eudemonic*, *evaluative*, and *affective*. Eudemonic ways of assessing well-being focus on the “self-assessed worth of an individual’s life” in terms of feelings of control and ability to make plans (Ryff & Singer, 1998, as cited in Jivraj et al., 2014, p. 930). The evaluative method uses a “global appraisal” item— “asking people how satisfied they are with their life” (Jivraj et al., 2014, p. 930). Affective well-being is the extent to which individuals have experienced positive or negative emotions (Tinkler & Hicks, 2011, as cited in Jivraj et al., 2014).

Lucas (2018) highlights the difficulty in developing a measure of such an individualized construct as well-being, writing, “different life circumstances are likely to affect different people in different ways” (p. 1), and points out that the importance people give to relationships or careers differs, with “some people . . . willing to sacrifice some degree of relationship quality to obtain a successful career, whereas others may make the opposite choice” (p. 1). While terms such as “happiness, psychological well-being, positive affect, and morale are often used interchangeably” along with subjective well-being (George, 2010, p. 331), they do not mean precisely the same thing. The distinction George (2010) makes comes down to what she calls “stability.” A person’s overall satisfaction with life and general attitude tend to be more stable across time than either happiness or positive affect, which are states seen as “changing rapidly and frequently in response to stimuli in the immediate environment” (p. 331).

One reason older adults tend to report higher levels of subjective well-being than younger or middle-aged adults is that they are more likely to compare themselves to those who are doing less well than they are (George, 2010). In a phenomenological study, consisting of in-depth

interviews with a small number of participants, gratitude for good health, having freedom to choose how to use time, feeling a sense of autonomy in life, and experiencing relationships in the moment contributed to feelings of well-being (Bauger & Bongaardt, 2016). Yen et al. (2012) cite belonging and agency as principal factors in well-being. Life satisfaction is also a way of viewing subjective well-being (Veenhoven, 2012).

### ***Active Aging***

The fitness center in my Colorado town north of Denver has an entire category of events and classes euphemistically titled “Active Adults,” and, as expected, available only to those 55 years of age or older. Active Adults promises to help older adults “live your best life” and offers everything from “indoor skydiving to coloring groups to Zumba Gold” (Carbon Valley Parks and Recreation District, n.d.). A sub-category of Active Adults is “Silver Sneakers” which “offers physical activity, health education, and social events to help reduce health care costs driven by the physical and mental effects of aging and physician and hospital visits” (Carbon Valley Parks and Recreation District, n.d.). *Less than 5 years and I can start living my best life? Wonderful. Sign me up.* The harder someone tries to convince you of how wonderful something is, the faster you should run. Clearly, getting older is somewhat terrifying—a one-way trip into the unknown. It is both entirely unavoidable and socially undesirable, leaving “. . . older women and men . . . with little option but to identify with and simultaneously resist the aging process” (Biggs, 2004, p. 55). What better way to cope with the uncertainty than by increasing activity?

Active aging, a framework developed by the World Health Organization (Teater & Chonody, 2020), puts the focus for older adults on “continuing participation in social, economic, cultural, spiritual, and civic affairs, not just the ability to be physically active or to participate in the labor force” (WHO, 2002, as cited in Teater & Chonody, 2020, p. 601). Self-esteem appears to derive from activity and involvement (McAuley et al., 2000). Retirement can create a great

deal of stress and a reduction of well-being (Wang, 2007), in part because it removes a key factor related to identity: work (Fisher et al., 2016). Older adults in this phase of life begin to find new ways to define themselves, often through what they do in their “free” time (Dionigi, 2002).

The active aging philosophy assumes that engaging in productive activity is good for older adults (Boudiny, 2013). One argument for so-called “active aging” is that older people should continue to contribute to the social and economic aspects of society, and that this is, in fact, their desire (Timonen, 2016). Laslett (1991) makes a strong argument that older people owe it to society to continue to work on the problems they have helped to create, at least as long as they are able. Engaging in “productive” roles such as working, volunteering, or caring for others helps to remove the perception that older adults are a “burden” (Morrow-Howell & Wang, 2013, p. 160). “Productive activity,” while difficult to define precisely, appears to include paid work, volunteering, education and training, and taking care of oneself (Schulte et al., 2018). Baker et al. (2005) argue that “activities defined as productive should benefit others (they should not be purely consumptive), should have a social component, and should be meaningful to individuals” (p. 433). They identified five types of productive activity that involve interaction with others: 1) paid employment, 2) formal volunteer work, 3) caregiving, 4) informal helping, and 5) do-it-yourself work, such as outdoor repairs and yard work that can potentially allow people to interact with neighbors and other people (Baker et al., 2005, p. 434).

This kind of ranking and categorizing is common in the literature and spans several decades. Lemon et al. (1972) classified activities into: 1) informal, 2) formal, and 3) solitary. Informal activities might include socializing with family members or neighbors. Formal activities would include things such as membership and participation in clubs or organizations. Solitary activities would include watching television, reading books or magazines, or engaging in

other pursuits on one's own. Only informal activities with friends were related to satisfaction with life in the group of older adults sampled at a California retirement community. Longino and Kart (1982), replicated the study with a more diverse population, and found that informal activities had a positive relationship to life satisfaction, solitary activities were unrelated, and formal activities were negatively related to life satisfaction. Burr et al. (2007) identify four types of productive older adults: 1) helpers, 2) home maintainers, 3) workers/volunteers, and 4) super helpers. Croezen et al. (2009) divided participants into five groups indicating their level of social involvement: 1) less socially engaged, 2) less socially engaged caregivers, 3) socially engaged caregivers, 4) leisure engaged, and 5) productive engaged. They found that those who were less socially engaged had worse physical health, greater mental health issues, more physical limitations, and suffered from profound loneliness.

Morrow-Howell et al. (2014) identified 5 different profiles describing the way older adults engage in activity. Older adults with low levels of activity “were more likely to be older, to have fewer assets, and to have less education” (p. 818). The activity they engaged in most often was health related. Older adults with very high levels of activity demonstrate the “model of active retirement” and have “higher levels of health, lower levels of depressive symptoms, and higher ratings of life satisfaction” (p. 818). They did not, however have a high level of mobility and therefore may engage in other ways, through personal relationships. Fernández-Mayoralas et al. (2015) grouped nursing home participants as active, moderate, or inactive, with those labeled active presenting with better cognition. Amano et al. (2018) found that participants with low levels of activity, who also had the highest level of cognitive impairment, were less active even in doing things that did not require a high level of mental ability, such as “playing with grandchildren or walking” (p. 660).

Volunteering is the productive action—next to caregiving—that is “most frequently encouraged in older populations” (Timonen, 2016, p. 72). It aims at making a “better use of the potential that the new generations of aging people represent . . . with good health, numerous competencies and abilities that they can use to serve the economy and the society” (Guillemard, 2013, p. 21, as cited in Calasanti & Repetti, 2018). Those who volunteer report better well-being than those who do not (Thoits & Hewitt, 2001), although as with the relationship between activity and cognitive impairment, the directionality is hard to establish (Amano et al., 2018). Furthermore, involvement in and of itself may not be enough to keep middle-aged and older adults content. It appears to be “the level of one’s engagement with paid work, volunteering, and caregiving” that determines “the extent to which involvement is associated with positive outcomes” (Matz-Costa et al., 2012, p. 286).

Participating in different activities seems to lead to a better quality of life in older adults (Baker et al., 2005). Calasanti and Repetti (2018) reported that study participants themselves expressed the belief that they should be active. Yet, so many variables, including health, gender, and socioeconomic status influence the way aging takes place (Dannefer, 1987). The older people get, the greater the differences in how they experience age become (Dannefer, 2003). Furthermore, not all older adults have problems filling their time or need to be coaxed into greater levels of activity. Many residents, particularly those at the younger end of the age-restricted span, are quite busy with non-leisure activities. They are working, offering support to adult children, or taking care of older parents (Roth et al., 2012).

The bias toward youth that is evident in what is defined as “productive” activity discounts many leisure pursuits, such as reading, that can add to a sense of well-being (Boudiny, 2013). While leisure activity can be defined as anything not resulting in pay (Kleiber et al., 2011), this



definition seems somewhat lacking—hardly covering the unpaid work involved in caretaking or housework, for instance, that while unpaid hardly qualifies as leisure. Chang et al. (2014) found that older adults with good social relationships are more likely to take on activities that lead to good health, such as leisure activities.

### ***Successful Aging***

“Be busy” Cruikshank (2009) commands, tongue-in-cheek, “for busyness is equated with worth, mental competency, and ‘successful’ aging” (p. 163). Shir-Wise (2019) points to a culture of conspicuous busyness that is prevalent in the United States and signals success. Successful aging is a concept originally articulated by Havighurst (1961) and later expanded upon by Rowe and Kahn (1997, 1998, 2015) in what is termed the McArthur model of successful aging. Rowe and Kahn (1998) encouraged an emphasis on the positive aspects of aging rather than looking at it as a period of decline and illness. They also focused heavily on personal responsibility for successful aging, writing, “Our main message is that we can have a dramatic impact on our own success or failure in aging” (Rowe & Kahn, 1998, p. 18), and insisted that success is “dependent upon individual choices and behaviors” (p. 37). One has successfully aged when one shows few signs of illness or disability, displays high levels of mental and physical functioning, and gets involved with social activities and relationships (Rowe & Kahn, 1997). Activity is highly connected to any concept of success in aging. Leisure activities in later life, along with level of education and complex work, are thought to protect against certain degenerative illnesses, such as Alzheimer’s (Scarmeas & Stern, 2003). Lee et al. (2019) found that mental activities, such as “reading newspapers, reading books, playing cards or games, solving puzzles, doing arts and crafts, listening to music, singing or playing music, and praying or meditating” (pp. 1226–1227) made a difference in cognitive function in retired adults while other types of activities, such as “physical, social, and household” (p. 1227) did not have any effects on cognition.

Glass (2003) notes the oddness of the concept, since no one frames infancy or childhood in terms of success. Still, the concept of successful aging seems to resonate with many older adults. A study of nearly 2,000 adults aged 65 and older found that 90% had considered what it means to age successfully, and about 60% had changed their ideas over the past 20 years (Phelan et al., 2004). Their ideas about successful aging covered a complex range of dimensions, including “physical, functional, psychological (mental), and social” (p. 214). Most thought of well-being as being analogous to successful aging and viewed social health as “the most important condition for well-being and successful aging” (Phelan et al., 2004, p. 215). Healthy aging needs to add “more life to years, not just years to life (Vaillant et al., 2004, p. 561).

It is important to note, however, that older adults do not necessarily define successful aging in the same way that researchers do. Teater and Chonody (2020) found that older adults viewed successful aging as a “combination of social, psychological, physical, financial, environmental, and spiritual aspects” (p. 619). They acknowledged the importance of good health while also recognizing that aging often does bring physical changes, including illness, that are outside of individual control (Teater & Chonody, 2020). These elements that are outside of individual control can be mitigated by mechanisms such as “positive thinking, spirituality, adaptation, and acceptance” (Teater & Chonody, 2020, p. 619). This study found a wider definition of success than merely “what one does” (p. 620), with the focus on being realistic about abilities and accepting physical and cognitive changes as a normal part of life (Teater & Chonody, 2020).

Of course, one criticism of successful aging is that it fails to accept that social inequality plays a vital role in how individuals age, as it does in virtually every other area of life (Estes, 2019). Social inequality here is defined as “group-based, unearned dis/advantages that accrue to

categorial status such as man/woman young/middle-aged/old, or upper/middle/working class rather than result merely from differences in personal discipline or value” (Calasanti & King, 2020, p. 3). Successful aging can also be seen as simply unrealistic, going as far as to exhibit “hostility toward aging bodies” (Morell, 2003, p. 69) and placing undue pressure on older adults themselves for structural issues in society that they are powerless to solve (Martinson & Berridge, 2015). Moreover, as Timonen (2016) points out, the concept of successful aging is “underpinned by a particular understanding of what ‘success’ is” (p. 13). Still, there is no consensus regarding what comprises this form of success. Depp and Jeste (2006) recorded 28 definitions while Cosco et al. (2014) found 105. Cruikshank (2009) points out that “successful” aging takes on a business-like model with clear markers for success, where “aging well has no such definitive markers” (p. 2). Teater and Chonody (2020) also indicated the problem with traditional successful aging messaging, with its emphasis on external factors that provides “a limited view of aging and one that also assumes a level playing field in making healthy choices and access to services and resources” (p. 620). This has caused a great deal of critical attention to be directed toward the McArthur model, which the authors see as providing opportunities for further research (Rowe & Kahn, 2015).

### **Importance of Activity for Older Adults**

Ekerdt (1986) poses the question, “What do people do with a work ethic when they no longer work?” (p. 240). The answer to that question varies, much as individual personalities and situations do. Many older adults feel that being busy in retirement is important and emphasize “a busy ethic” in which leisure time is “earnest, occupied, and filled with activity” (Ekerdt, 1986, p. 239). It puts a heavy emphasis upon activities, including exercise, travel, visiting restaurants, and taking care of oneself (Ekerdt, 1986), and is connected to the dominant work ethic of the culture

of the United States and some other Western countries, which connects “work with virtue” admiring habits such as “diligence, initiative, temperance, industriousness, competitiveness, self-reliance, and the capacity for deferred gratification” (Ekerdt, 1986, p. 239).

Many older adults who are no longer working report being remarkably busy while others lament the idea of “just sitting around” (Ekerdt, 1986, p. 240). Some older adults are keen to point out how many activities they participate in, including leisure pursuits, such as swimming, reading, or hiking, along with paid employment and volunteer work (Calasanti & Repetti, 2018, p. 28). Ekerdt (1986) points out the nature of the activities themselves is beside the point, writing, “exactly what one does to keep busy is secondary to the fact that one purportedly is busy” (p. 241). The idea that busyness is desirable goes virtually unchallenged. A culture that privileges working hard as the ultimate virtue must find a way to justify the enforced leisure that comes with retirement, when older people are forced out of employment but still need to retain a sense of dignity (Ekerdt, 1986). Not only our identities but our sense of well-being is related to the things we “do” (Matz-Costa et al., 2012, p. 278). Identity formation is less about work and more directed toward “the creation of symbolically valued lifestyles” with status coming “more powerfully from the use and quality of individual leisure-time than from what work is done or how money is earned” (Gilleard & Higgs, 2007, p. 25).

Activity is seen by many older adults as a way to remain independent (Katz, 2005). Yen et al. (2012) found a strong desire to stay busy and active—“on the go” as some of them phrased it. Activities included “work, volunteering, classes, and leisure travel.” The authors reported that the amount of activity engaged in by various individuals appears to be connected to personality, physical ability, and the desire to seem young. Having a car was found to be crucial to older adults’ ability to be as busy as they wanted to be, with many engaging in activities outside their

immediate neighborhoods. Physical activities create better health outcomes (Chang et al., 2014). Unfortunately, engaging in physical activity tends to trend to decrease in middle and older age (Shaw et al., 2010). Even so, Szanton et al. (2015) report the perhaps surprising news that adults aged 65 and older prefer physical activities, regardless of income or ethnicity, over more sedentary ones, and also that a majority of those surveyed in a representative sample comprising more than five thousand individuals had been able to do their favorite activity within the previous month. The authors noted the possibility that social desirability may have influenced respondents to indicate healthy activities as their favorites, perhaps being reluctant to cite gambling or drinking alcohol as their preferred ways to pass time (Szanton et al., 2015).

Exercise is often seen as way to stave off aging (Tulle, 2008), but still, lack of physical activity continues to be a problem for older people, with only around 20% of those aged 60 or older participating in regular physical activity (Carlson et al., 2010). However, being physically active in older age is a relatively recent phenomenon (Sekot, 2010) with physical decline as the result of getting older being largely accepted as part of the life course prior to the 1990s (Tulle, 2008). Dionigi (2015) notes that older adults who engage in exercise typically fall into one of three categories: rekindlers, continuers, or late bloomers. Doing physical activities is related to believing that life has meaning and purpose (Hooker & Masters, 2016). Even visualizing physical activity can have a positive effect on how well older adults feel, with a group reporting higher rates of subjective vitality simply after having read a short piece describing physical activity (Ryan et al., 2010). Cognitive activities are a good choice for those who may no longer be able to take on physical activities because of health problems (Chang et al., 2014).

Many older adults have a feeling of “calling” even in retirement, looking for meaningful activity that provides a level of satisfaction that other leisure activities do not (Duffy et al.,

2017). Older adults express a preference for activities that bring them into contact with those of other generations and that cultivate interpersonal relationships (Aguilera-Hermida et al., 2020). People who are retired but involved in activities they see as meaningful, including part-time employment, volunteer work, or taking care of others are less likely to experience depression and report better well-being and a more meaningful existence (Pilkington et al., 2012). Duffy et al. (2017) reported on the various activities older adults perceived as “callings”—or activities that brought particular meaning to their lives. These were: 1) helping others, 2) family/caretaking, 3) investment in self, 4) arts, 5) teaching, 6) civic engagement, 7) entrepreneurship, 8) religion, 9) investment in previous career, 10) travel, and 11) nature (p. 404).

Unfortunately, some of the respondents wanted to do these kinds of meaningful activities but experienced certain barriers. These were: 1) no resources, 2) age and health issues, 3) still searching, 4) retired, 5) care for others/responsibilities, and 6) need time for self (Duffy et al., 2017, p. 405). Allan and Duffy (2014) found working adults report that helping others—especially those not related to them—gives their work the most meaning. Some retired adults may begin new activities and hobbies as a way to give meaning to their lives and avoid regret (Erikson, 1963). Weil (2014) describes the pride volunteers at a neighborhood senior center take in their volunteer work “as they help organize trips and dances, work with local college ‘kids,’ and teach grammar school pen pals ‘to write letters in English’” (p. 2), work that demonstrates intrinsic motivation. Of course, even those with senses of calling or expectations for retirement may be disappointed, with Beehr and Nielson (1995) finding that some older adults had expectations for activities in retirement that did not come about (Beehr & Nielson, 1995), such as great social connections, personal growth, and employment. Some older adults, such as Maria, a

participant mentioned in Weil's (2014) work, engage in less-than-desirable activities as way to quell boredom. Maria confesses she loves to dance but plays bingo "just to pass the time" (p. 3).

Although retirement can be seen as a "new start," giving older adults the opportunity to try new things and become more active, engagement in activity tends to stay relatively constant throughout life with few adults actually taking up new activities in retirement (Agahi et al., 2006). The way an individual experiences activity—whether it is largely positive or negative—affects whether the outcome of being active is associated with higher or lower well-being (Matz-Costa et al., 2012). Activity itself has no intrinsic positive affect on well-being. Some activities, even if meaningful or important, are associated with a reduction in well-being in older adults. A good example is that of acting as a primary caregiver, particularly to a person with dementia (Son et al., 2007). While volunteering is societally encouraged, as explained in the previous section, older adults do not necessarily want to replace employment with volunteer roles (Clarke & Warren, 2007). "In some cases, retreating from activities might well be a better means for increasing quality of life" (Calasanti & Repetti, 2018, p. 28).

How individuals experience leisure throughout their lives affects their attitudes toward old age and retirement, with those who generally have trouble filling free time finding retirement meaningless. "The current use of leisure—as a time to rest, or as a time to be busy—may also be extrapolated into expectations for retirement" (Gee & Baillie, 1999, p. 113). Many men who have tended to be either working or engaged in low levels of outside activity, tend not to increase their activity level upon retirement (Morrow-Howell et al., 2014).

### **Aging in Place**

Older adults used to live with younger family members when they needed additional support, but they have been increasingly "expected to minimize the burden they place on those who love and care for them" (Thomas, 2004, p. 75). Only six percent of adults 60 or older live

within an extended multigenerational family (Ausubel, 2020). While some older adults in the United States continue to be cared for in the context of extended families, this is uncommon, and instead, many live in a dedicated facility of some kind, ranging from “independent living to assisted living to nursing facilities that provide 24-hour care” (Timmerman, 2006, p. 23).

“Aging in place” is defined by the Center for Disease Control and Prevention (2013), is “the ability to live in one’s own home and community safely, independently, and comfortably, regardless of age, income, or ability level.” Some other definitions make explicit the alternative, which is cited as “residential care” (Davey et al., 2004, p. 133). The concept goes beyond a certain residence to the wider community in which the individual lives (Peace et al., 2006). While a frequently used term in gerontology, older adults in a study by Wiles et al. (2012) had never heard it, and sometimes viewed it negatively, perhaps as meaning individuals aging at home were “trapped” (p. 360). In investigating the term with a group of older adults, the researchers and participants came up with their own definition, which is very similar to those appearing elsewhere in the literature: “staying in one’s home or community” (p. 360).

Ahn, Kwon, and Kang (2020) identified three clusters of individuals choosing to age in place, with more than half of participants being termed “balance achievers,” or those whose “could be described as an unforced, reasonable response to their aging process, as their desire to age-in-place did not seem to be an attempt to counterbalance lack of well-being in a particular domain” (p. 10). Carver et al. (2018) note that, “The familiarity of being at home contributes to well-being and successful healthy aging” (p. 10). “Attachment to place” (Andrews et al., 2007), a related idea, gives older adults a comforting sense of home and identity (Rosel, 2003). This is what most older adults claim to want, enjoying the familiarity of a place they know (Sabia, 2008), and is particularly true for those who are happy in their established communities (Kwon et



al., 2015). Even very old adults (those over 90) can live on their own or with a partner or other individual willing to provide care, with more than half of those in one sample able to age in place (Paganini-Hill, 2013). Older adults want alternatives regarding where and how they live (Wiles et al., 2012). Aging in place can be seen as an “attainable and worthy goal” (Vasunilashorn et al., 2012), p. 2) rather than a requirement.

While aging in place is desirable for most older adults, a variety of factors help determine whether it is an appropriate option for the individual. These include the community itself (Michael et al., 2006), the availability of social outlets (Ahn, Kang, & Kwon, 2020), access to transportation (Fänge, et al., 2012), opportunities to socialize and engage in recreation activities (Carver et al., 2018), and types of homes available (Wahl & Weisman, 2003). Many also report placing a high value on community (Croucher, 2006), which retirement communities can sometimes offer more readily than existing neighborhoods. Being socially engaged is associated with many positive outcomes, such as greater social capital (Johnston & Lane, 2018). These outcomes are best achieved in what Scharlach (2009) call “aging-friendly communities,” those in which “people can live their entire lives, if they so desire, rather than having to relocate and lose their social capital” (p. 6).

Ideally, aging in place, also known as “aging in community,” brings “like-minded citizens together” for “mutual support and caring to enhance their well-being, improve their quality of life, and maximize their ability to remain, as they age, in their homes and communities” (Blanchard, 2013, p. 7). Four models for supportive housing for adults are: 1) Homeshare, 2) Cohousing, 3) Naturally Occurring Retirement Communities Supportive Services Program (NORC-SSPs), and Villages (Seetharaman et al., 2020). The homeshare model pairs younger people in need of housing with older adults in need of support in a mutually beneficial

arrangement (Martinez et al., 2020). Co-housing, an idea that originate in the Netherlands and other European countries (Glass, 2012) simply means that within this model, older adults live with other older adults. Naturally Occurring Retirement Communities Supportive Services Program (NORC-SSPs) come about, as the name suggests, naturally, and appeal to the needs of older adults (Parniak et al., 2022). Villages models are purpose-built communities that provide a variety of amenities and activities for older adults (Schwitter, 2020).

Aging within the context of one of these types of communities can provide supportive benefits for older adults, which are diverse and include specific types of housing, as well as access to healthcare and transportation (National Aging in Place Council, n.d.). An “ideal supportive community or environment should aim to achieve person-environment fit” (Hou & Cao, 2021, p. 2). The Villages model is distinct from the others in that it tends to cater to a more affluent clientele, and communities are largely independent with membership fees providing a primary source of funding (Scharlach et al., 2012). In addition to being wealthier, those who live in Village-style communities are largely White, older than 65, and less in need of special health care than other older adults in the U.S. (Scharlach et al., 2012).

### **Age-Segregated Retirement Communities**

Many retirement communities exist because they offer a sense of community that older adults value (Simpson, 2010, as cited in Paganini-Hill, 2013). It is important for older adults to have social outlets and be involved in their neighborhood (Emlet & Moceri, 2012). To some extent, this is because older adults live in their own separate country, so distinct is their experience from that of the rest of society (Pipher, 1999). Glass and Skinner (2013) ask, “Is that what we as a society want—to put all of the older adults in separate towns? Is that what older adults want?” (p. 76). One might conclude that retirement or age-restricted communities are a direct result of ageism (McHugh & Larson-Keagy, 2005). McHugh (2003) points out that older

people “are resident in an ageist society that represses and denigrates old age” and argues that their choice to live amongst “their peers should not be surprising” (p. 181).

While there are certainly complex reasons for age segregation in modern Western society—and many of these are not entirely positive—age-restricted communities appear to have an appeal for some older adults for a variety of reasons. They can give older individuals a sense of autonomy and avoid having their children act as caregivers (Kingston et al., 2001). Some older adults may also be attracted to the “active lifestyle fostered in retirement communities” which has health benefits that are “accepted as unquestioned fact by retirees” (McHugh, 2003, p. 170). Despite the availability and attractiveness of age-restricted communities for older adults, the majority (71%) of households containing individuals aged 55 and over are not in communities with age restrictions or with neighbors over the age of 55 (MetLife Mature Market Institute, 2009). Older adults in many cases prefer to stay in their own homes (known as “aging in place”) rather than move, regardless of health concerns or other issues that might prompt relocation (Kwon et al., 2015). Younger older people (closer to 55) are more likely to move in order to downsize or for access to amenities (Hansen & Gottschalk, 2006). Some scholars question whether age-restricted communities are even necessary, while Glass and Skinner (2013) conclude that “more housing options, rather than fewer, are needed” (p. 62) for older adults, and make a case for their inclusion as one of the available options. Jacobs (1976) found that residents were unfilled by the promises of an “active” lifestyle in this kind of community.

### ***History and Description of Age-Restricted Communities***

Not all age segregation is intentional, with some of it being the natural byproduct of where people naturally end up living (Hagestad & Uhlenberg, 2005). An “extreme version of residential age segregation occurs in intentionally age-segregated housing” (Hagestad &

Uhlenberg, 2005, p. 348). These kinds of age-restricted communities can be divided into five basic types, according to Hunt et al. (1984): 1) new towns (large self-contained retirement communities including healthcare services), 2) retirement villages (medium sized communities focuses on recreation and leisure), 3) retirement subdivisions (housing with limited leisure facilities), 4) retirement residences (low-income retirement housing in the form of apartments), and 5) continuing care retirement centers (communities that focus on healthcare and assistance, primarily for people who are no longer able to be independent).

Age-restricted communities are a relatively recent phenomenon in the United States, appearing in the aftermath of World War II. The Phoenix-based Del Webb Construction Company was a forerunner in the concept, opening the “active adult retirement community” (AARC) community in the United States, in Youngtown, Arizona, in 1954 (Trolander, 2011a). The founder wanted to create a community affordable enough that older people could support themselves with their Social Security checks (Glass & Skinner, 2013), a scenario difficult to imagine in the early twenty-first century. Later, when it became evident that many older people had the money and desire for upscale houses with ample amenities, these communities began to cater to “successful Americans who have worked hard all their lives, raised families, invested and saved, earning the right to ‘escape’ to sanctuaries that preserve their foundational values and virtues, their way of life” (McHugh & Larson-Keagy, 2005, p. 250).

While many of these communities were originally established in warm climates such as Florida or Arizona, they are now located all over the United States, making it easier for older adults to remain close to family and friends (Glass & Skinner, 2013). These communities can be seen as an “antidote to negative stereotypes of older age as a period of decline in physical and social competencies (McHugh & Larson-Keagy, 2005, p. 252). Many intentionally avoid the

term “retirement,” since, as Katz and McHugh (2010) argue, one of their primary aims is to encourage residents toward an active, socially engaged lifestyle. Furthermore, many of the younger residents have not yet reached the age of retirement (Becker, 2001).

### ***Residents of Age-Restricted Communities***

Retirement villages “tend to include persons who are younger, who are less functionally impaired, who are more economically secure, and who reside in communities whose predominant SES is middle class or higher” and are often at least 65, even though the lower end of age range can be 50 (Greenfield et al., 2013, p. 935). A primary goal of village-style retirement communities is “strengthening older adults’ social relationships and reducing social isolation” (Greenfield et al., 2013, p. 932). The term “village” creates idealized visions of a small, intimate place (Evans, 2009) and has an obvious marketing advantage. While the houses in these communities are often luxurious (Glass & Skinner, 2013), the associated lifestyle often proves the primary selling point, with buyers choosing to “purchase lifestyle, not housing” (Cecilian, 2001, p. 124). Amenities and programs have expanded beyond the traditional golf course, tennis courts, clubhouses, and swimming pools to include fitness centers, computer clubs, educational classes, movie theaters, and even stores and restaurants” (Glass & Skinner, 2013). The most frequently cited reasons age-qualified individuals choose to move to a retirement community are: 1) family/personal reasons, 2) financial or job-related reasons, 3) changes in marital status, 4) desire for better house, and 5) desire for less expensive house (MetLife Mature Market Institute, 2009, p. 30).

The range of ages can be a complicating factor in these communities, with “different age cohorts . . . likely to have different needs and preferences” (Logan, 2001, p. 41). Those adults under the age of 60 who continue to work and reside in age-qualified active adult communities

made up more than 20% of all residents in 2007 (MetLife Mature Market Institute, 2009). Residents prioritize access to healthcare, transportation, and retail outlets; a reduction in chores; and social interaction and activities (Gibler et al., 1998). Amenities most prized by older adults in a study by Bernstein et al. (2011) were low home maintenance, nice landscaping and communal parks, walking and cycling paths, and various home styles. Despite the interest in healthcare as part of a community offering, the percentage of adults over the age of 70 who live in age-restricted that do not provide healthcare is about 6–7% (Mullen et al., 2011). This can be confusing for those who expect to receive nursing care (Bernard et al., 2004).

Communities influence the way individuals connect with neighbors, social networks, and others (Ahn, Kang, & Kwon, 2020). One of the top reasons older adults move to retirement communities is for the social interaction—even more than for safety or possible access to healthcare (Petersen & Warburton, 2012). New people or those with health conditions may have difficulty achieving a sense of belonging, and risk “marginalization, social isolation, and/or social exclusion” (Nielson et al., 2019, p. 25). Newcomers to a retirement community in one study found it easier to integrate when they already had friends living in the community; those without “ready-made friends” (Nielson et al., 2019, p. 27) reported an experience similar to what they remembered from school—“this is our seat” or “you can’t sit there” (Nielson et al., 2019, p. 28). Some found activities such as bowling, or music provided a way to make connections. Bernard et al. (2012) conducted interviews with 52 residents of a retirement community in the United Kingdom, with 11 of the participants writing diary entries about “the sorts of things they did socially and for recreation; the ways in which they did (or did not) join in life . . . and the sorts of relationships they had” (p. 108). Residents did not necessarily form cohesive social bonds, and physical and cognitive difficulties contributed to outsider status.

### ***Activity in Age-Restricted Communities***

Purpose-built retirement communities provide many activities for older people who want things to do (Trolander, 2011b). Participants in a study of The Villages, an active adult retirement community in Florida made famous by the hedonistic lifestyle outlined in *Leisureville: Adventures in a World Without Children* (2009), were asked to compare themselves with adults of the same age group outside the community. Sixty-four percent (64%) said they were more social, 73% said they were more active, and 86% reported having a better quality of life (Fishleder et al., 2016). Residents of The Villages were unusually active compared with the general population. Sixty-five percent (65%) of respondents reported “adequate” or better levels of physical activity, in comparison with just 20% of adults in the general population (Christmas & Anderson, 2000). This seems to corroborate the assertion made by Fishleder et al. (2016) that “Older adults moving to active planned retirement communities are perhaps a distinct group” (p. 537), more active than other adults of similar age. These communities are often marketed to a certain type of consumer, with a typical ad showing “a robust man with iron gray hair and his equally attractive late-fifties wife, the two relaxed on a slope overlooking a golf course, content in their good health and their companionship” (Weiss, 2005, pp. 10–11).

### **Effects of the COVID-19 Pandemic on Older Adults**

The worldwide COVID-19 pandemic, which resulted in widespread lockdowns for more than two years beginning in March 2019, had wide-ranging effects on older people, particularly in terms of activity and both mental and physical health (Damiot et al., 2020). Not only did older adults face tremendous ageism during the pandemic (Ng & Lim-Soh, 2021), but social distancing measures greatly reduced their options for social and physical activity (Son et al., 2021). Hill et al., (2020) note that the pandemic “limited how we engage with daily activities” (p. 788) and

caused difficulty for many older adults in establishing a sense of purpose. Callow et al. (2020) found depression, anxiety, and reduced physical activity in more than a thousand older adults surveyed during the COVID-19 lockdowns in North America. Fewer older adults attended group fitness classes, and many made attempts to do these kinds of activities at home (Goethals et al. (2020). However, Sasaki, et al. (2021) found that women who were socially involved were more likely to continue physical activity during lockdown and both higher socioeconomic status and prior social involvement before restrictions started seemed to affect the ability of older adults to remain physically active. It is important that older adults remain physically active, since this has an effect on various health outcomes (Damiot et al., 2020). López et al. (2022), found that while the oldest of older adults did not experience especially negative psychological outcomes as a result of lockdown, having a good support system and a high level of resilience made a difference to both older and younger older adults. The importance of socioeconomic status is evident in the finding of disparity in access to outdoor green spaces for those with lower incomes (Levinger et al., 2022).

### **Conclusion**

The goal of a case study, such as the research on The Villages (Fishleder et al., 2016), is to understand a particular context rather than attempting to discover general truth (Merriam, 2009; Stake, 1995). Through investigating a particular case, *concrete universals* (Erickson (1986) can emerge, bringing insights that illuminate larger truths about the phenomenon under consideration. Flyvbjerg (2011) points to the strength of case study as “depth—detail, richness, completeness, and within-case variance” (p. 314). It also offers “an in-depth exploration from multiple perspectives of the complexity and uniqueness of a particular project, policy, institution, program or system in a ‘real life’ context” (Simons, 2009, p. 21). The case study is particularly useful for “how” and “why” questions, for complex settings (Yin, 2014), such as those utilized in



confronting the complex factors associated with how older adults experience activity in a 55+ active adult master planned community. I used case study methodology to illuminate the lived experiences of older adults in a single community.

### **Summary of Chapter II**

In this chapter, I have provided an overview of relevant literature regarding involving older adults as co-creators of research. I have also addressed the meaning of aging and retirement, youth-oriented culture and ageism, performance of age, active and successful aging, the importance of activity for older adults, age-restricted retirement communities, and the effect of the COVID-19 pandemic on older adults' activities, through a description of selected literature that frames and contextualizes this study. In Chapter III, I describe my researcher stance, epistemology, theoretical framework, methodological framework, setting, data collection protocol, data analysis procedures, trustworthiness, ethical considerations, and representation of findings.

## CHAPTER III

### METHODOLOGY

I am delighted with the positive responses and am sending this letter to the first “wave” of people that said “yes.” As I mentioned in our phone conversation, my list is not being shared with anyone. Becky will not have any names until you have made contact with her, and she knows she is to keep the list private unless you tell her she may share your name in some way. She is getting a copy of this letter so that she also knows how contacts are being structured. (Portion of a letter from Gatekeeper 1, January 25, 2021)

This research study centers around the following questions, one methodological and two contextual:

- Q1     What are methodological considerations when involving residents of a 55+ active adult master planned community as co-creators of research?
- Q2     How do residents of a 55+ active adult master planned community experience “activity”?
- Q3     Which activities do residents of a 55+ active adult master planned community prefer?

I took an instrumental case study approach (Stake, 1995) and relied on research participants as co-creators of the study as much as possible, which is “a goal of the gerontological approach” (Weil et al., 2017, p. 663). Over the following sections, I describe my researcher stance, epistemology, theoretical framework, methodological framework, setting, data collection protocol, data analysis procedures, trustworthiness, ethical considerations, and representation of findings.

#### **Researcher Background and Stance**

I did not begin my formal education in research methods until I was 46 years old, and I only wish I had started earlier. I have degrees in history, education, creative writing, and English

with an emphasis on teaching. My first serious research study was my undergraduate thesis, which focused on an unusual period in prison reform at the Washington State Penitentiary, back in the late sixties and early seventies. I used the unpublished papers of psychiatrist William R. Conte, former Washington State Director of the Department of Institutions, which were held at the state library and contained about 25,000 pages of notes, memos, letters, and other documents. Later, as a full-time faculty member teaching academic writing in a doctoral program, I attended the Thinking Qualitatively Conference produced by the International Institute for Qualitative Methodology and held at the University of Alberta in Edmonton, Alberta, and took Introduction to Qualitative Research through Nova Southeastern University. Qualitative research seemed a natural fit for me, and used skills I was familiar with, including interviewing and artifact analysis. Upon returning to higher education as a doctoral student at the University of Northern Colorado in the Department of Applied Statistics and Research Methods, I developed an appreciation for all the varied ways research can be approached—the entirely new language of statistical methods that I have learned to enjoy and respect, along with new qualitative methods.

When the time came to choose a dissertation topic, it did not take long for me to focus on working with older adults in a 55+ active adult master planned community, and I knew I wanted to do fieldwork, which I see as “an artistic undertaking” (Wolcott, 2005, p. 3). Lofland et al. (2005) write, “fieldwork takes advantage of researchers’ personal connections to the world(s) around them, seeing those connections as avenues to potential research” (p. 9). This is certainly true in my case. My father and mother were both residents of the 55+ active adult master planned community I researched, having moved there in March 2016. My mother died just over five years later, in June 2021. My father continues to live in the community. By the time I began this study, I had spent considerable time in the community, walking the trails, using the fitness

center, and even surprising my father outside his house on his birthday on two different occasions. But my interest in working with older adults and in activity in older age preceded my parents' move to the community and drew on several aspects of my experience.

I have long been interested in how people connect their self-concept to what they *do*. My mother was always *doing* something—walking for exercise, cleaning, baking, organizing activities at the church or school, volunteering, driving in a carpool, talking to friends on the phone, paying bills, telling us to clean our rooms, shopping, taking classes at a community college, and working as a bookkeeper. Her self-concept underwent a dramatic change at the age of 49, when she was diagnosed with Parkinson's Disease, which brought limitations. "I used to do *everything*," she said. She lived with the disease for 25 years, until her death at the age of 73.

My father, who retired at the age of 62, remains, at 79, a "model" older adult, one whom Dosman et al. (2006) would describe as engaged in "a broader set of activities, challenging the image that emerged from the early literature of older adults whose lives are devoted to self-care and leisure" (p. 403–404). While he engages in some self-care and leisure—running and playing golf being the primary examples—he was the sole caretaker for my mother until her death and regularly babysat two young grandchildren who live nearby before COVID. He built custom bookshelves for his house, has movie nights with friends, is actively involved in church (pre-COVID), and surprised everyone by winning a bid in an online auction for a drive in an unlimited hydroplane on Lake Chelan.

### **Shifting Fortunes**

I intended to complete this study in March 2022, having finished data collection on November 1, 2021. In mid-November of 2021, I began having difficulties reading. Every day it seemed to get worse, and the day I finally went for an MRI, it took nearly an hour for me to read a few pages of a simple thriller. I had already decided to stop driving after missing a freeway exit

twice. The morning of the MRI, on the day marking the 80<sup>th</sup> anniversary of Pearl Harbor, I kept making mistakes on a pile of thank-you notes, writing letters wrong or upside down. The MRI revealed devastating news: I have the deadliest form of brain cancer, glioblastoma, on the left occipital lobe of my brain. The average life expectancy following diagnosis is 14 months. As of my dissertation defense date, I will have survived nearly 7 months. Two surgeries, 30 rounds of radiation, and 62 doses of chemotherapy (and counting), and I feel good. But there is no denying that the person who walked into the hospital on December 7, 2021, is not the person who walked out 8 days later. The person who began this study is not the person who finished it.

When I conceived of this study, in the Fall of 2020, I thought I had years of life ahead of me. I now have more in common with many of my participants than I ever imagined I would. Not only am I keenly aware of the passage of time, but I contend with disabilities that curtail my freedom. I cannot safely operate a car, so I am reliant on others for transportation. My poor visual abilities put me at risk for falls, and I have taken a few. As a former avid long-distance runner, I am advised not to run outdoors, so I content myself with a treadmill. I have not read a book for enjoyment since my diagnosis, although I have made occasional attempts. I have learned to listen to audio books. My work required the ability to quickly scan materials for significance; I was very good at it. Now I scan poorly. My academic career is over, my life ending. In short, I know about bodily betrayal, about loss of identity. I am, in a sense, old.

### **Epistemology**

Most of us know things, or believe we do. Our lives would be unmanageable without a certain degree of confidence in a set of assumptions. As a branch of classical philosophy, *epistemology* is the study of what knowledge is, comprising “its origins, limits, and justification” (Hofer & Bendixen, 2012, p. 227). It considers “what constitutes knowledge . . . how evidence becomes truth, how valid inferences are to be drawn” (Gegeo & Watson-Gegeo, 2001, p. 57)

along with other issues related to knowing. “An epistemology is or includes an account of what makes X a relevant reason for believing Y” (Hollis & Smith, 1996, p. 112). The ways we think and talk about knowledge are crucial to how we approach the world. Gerken (2017) insists we “should think more about how we think about knowledge” (p. 2). What does it mean to “know”? This topic has become widely discussed in recent years as individuals have tended to retreat into their own individual truths. Stuhr (2020) notes that, “people simply assert or testify to their own truths” (p. 531).

Some view knowledge as “finite, certain, and handed down from authority,” while others see it as “tentative, evolving, and constructed by the learner” (Hofer & Bendixen, 2012, p. 227). Whatever the conclusion, knowledge is always relational, constructed or passed on in the context of community (Nelson, 1993). An often-related research study features caged gorillas sprayed with cold water whenever they approached a bunch of bananas. One by one, individual gorillas were removed and replaced with new gorillas who warn the others not to approach the bananas. Eventually, there was not a single gorilla who had been personally sprayed with cold water—but none of them would approach the bananas (Olson & Sommers, 2004). Like the gorillas, many of us “know” things, but we don’t know how we know them. Most of what we “know” about the world is constructed not by nature but through convention (Kratochwil, 2008), and few of us give our epistemology the attention it deserves. Research methodologists have a responsibility for developing an epistemology that guides their work. Darlaston-Jones (2007) notes the importance of making the connection between epistemology and research methods, arguing that “identifying our orientation can help frame our research design” (p. 19).

### **Social Constructionism and Pragmatism**

I appreciate what Marshall et al. (2005) term “social constructionism with a twist of pragmatism.” I do not see the purpose of the “paradigm wars” (Lincoln & Guba, 1985) nor the

sense in the “incompatibility thesis” (Onwuegbuzie & Leech, 2005), in which some qualitative and quantitative researchers contend that an irreconcilable divide exists between the paradigms. Like Allwood (2012), I would argue that specific methods have specific uses in the context of specific research problems. Pragmatic researchers do not denounce certain methodologies but choose the methods that best suit the project at hand (Onwuegbuzie & Leech, 2005). Allwood (2012) further points out that all research is at the very least qualitative in the sense that it must be interpreted; it does not consist of strings of uninterpreted numbers. *Someone* must decide what the data means, with Allwood further pointing out that researchers always function as instruments in any study, an assertion I support wholeheartedly. The researcher is always deciding what to ask, how to ask it, what evidence will be considered, how it will be analyzed, and what it will be determined to mean in a real-life setting.

It makes sense that a research study assessing the efficacy of two different cancer drugs would use different methods to reach a meaningful conclusion than one assessing the impact of two different styles of physician bedside manner on the way patients feel about their cancer treatment. Both quantitative and qualitative methods have distinct roles and I have respect for both. Having acknowledged that, I would add that my own background, skill set, and natural inclinations point me more often in the direction of questions that can be best answered using qualitative methods. I am not a cancer researcher, a chemist, a biologist, or a statistician. Even within the social sciences, while I fully understand the importance of setting up a research design to test, for instance, whether there is a statistically significant difference in achievement between three classes using different instructional methods, I would be far more interested in finding out *why* the differences exist and how the students in the three classes describe and interpret their experiences. I appreciate the following observation made by Walsham (1993): “In the

interpretive tradition, there are no correct and incorrect theories but there are interesting and less interesting ways to view the world” (p. 6).

### **Social Constructionism**

Through this study, I attempt to make sense of human perspectives through social constructionism which sees “knowledge as constructed as opposed to created” (Andrews, 2012). Often compared to constructivism (with the terms regularly used interchangeably), the two paradigms differ in terms of their focus, with constructivism seeing the individual as primary concerned with constructed reality through mental processes and social constructionism focusing on this process as social and collective rather than individual (Young & Collin, 2004). In fact, our individual identities and attitudes are constructed from the social context (Hogg & Smith, 2007), with other people with whom we interact providing us as individuals with the mechanisms to make meaning out of reality (Berger & Luckmann, 1991). Dialogue between people creates shared meaning in which conversation partners can take certain kinds of understanding for granted—knowing that others know what they mean (Berger & Luckmann, 1991). Social constructionism can be seen as demonstrating how “people come to describe, explain, or otherwise account for the world (including themselves) in which they live” (Gergen, 1985, p. 266). People are the leading actors of their own lives, and they have reasons for the actions they take, and the ways they choose to make meaning of their existence (Kratochwil, 2008).

Stake (1995), a prominent case study methodologist, firmly supports the idea that “most contemporary qualitative researchers hold that knowledge is constructed rather than discovered” (p. 99). This perspective further “recognizes the importance of the subjective human creation of meaning but doesn’t reject outright some notion of objectivity” (Crabtree & Miller, 1999, p. 10). This approach recognizes that truth is constructed through social interaction (Searle, 1995) and



values a collaborative approach between the researcher and participants, focusing on the voices and perspectives of participants (Crabtree & Miller, 1999). Researchers working from this perspective would argue that “no object can be adequately described in isolation from the conscious being experiencing it, nor can any experience be adequately described in isolation from its object” (Crotty, 1998, p. 45). They do not, however, deny objective reality. The focus is on “how knowledge is constructed and understood” (Andrews, 2012, para. 25).

### **Pragmatism**

Charles Sanders Peirce (1902), one of the founding fathers of pragmatism, wrote, “Consider what effects, that might conceivably have practical bearings, we conceive the object of our conception to have. Then, our conception of these effects is the whole of our conception of the object” (p. 321). Pragmatism is associated with “action and change and the interplay between knowledge and action” (Marshall et al., 2005, p. 2). As Goles and Hirschheim (2000) point out, pragmatism is open to any methods that will help to illuminate the specific research study.

For that reason, I would count myself as not only a social constructionist but a pragmatist. Marshall et al. (2005) argue that the two paradigms can be combined, although the authors caution that certain epistemological differences can be difficult to merge because of differences in view about knowledge. Qualitative researchers tend to adopt one of two stances: 1) “an interpretive stance aimed for understanding that is appreciated for being interesting,” or 2) “a pragmatist stance aiming for constructive knowledge that is appreciated for being useful in action” (p. 15). I would tend toward the first stance, while maintaining the hope that what is interesting might also be useful. This largely hinges on how one defines the terms “interesting” and “useful.” I like Epstein and Klyukanov’s (2009) definition of *interesting* as the “presentation of a consistent and plausible proof for what appears to be least probable” (p. 78). He goes on to

point out that the least interesting ideas are those that are obvious or lack evidence. As for usefulness, I would echo Flexner's (1939) observation that "most of the really great discoveries which had ultimately proved to be beneficial to mankind had been made by men and women who were driven not by the desire to be useful but merely the desire to satisfy their curiosity" (p. 545).

### **Epistemology Applied to the Current Study**

According to Andrews (2012) "Realism and relativism represent two polarized perspectives" both of which can create problems for qualitative researchers. However, he also argues that social constructionism does not deal with issues of independent reality, which are properly ontological in nature. For example, a social constructionist can recognize that a disease "can and does exist as an independent reality" while "the naming of disease and indeed what constitutes disease is arguably a different matter and has the potential to be socially constructed" (para. 15). Hammersley (1992) advocates for what he terms "common-sense knowledge" or "subtle realism," which accepts a reality independent of human perception but claims there is no way to know what that reality is. Reality can only be represented rather than reproduced, which implies that the researcher inevitably affects his or her study (Andrews, 2012).

This paradigm makes sense for the kinds of questions I aim to explore in this study. While there is certainly an objective truth about how any given resident of a 55+ active adult master planned community has spent his or her day, only that resident can say whether the day was productive or enjoyable or meaningful. To paraphrase Andrews (2012) and draw on his point about the nature of disease, I would say that activity can and does exist as an independent reality, but the naming and defining of activity is clearly socially constructed. What does it mean to be an active person? Who decides which types of activities confer status and value and which

do not? Who decides that being active is necessarily a positive or desirable thing? Aging itself is similarly a social construct; what does it mean to be “old”? At what age or according to which characteristics is one placed within this category? Tradition in modern Western society has tended to class old age as “retirement age”—the point at which an individual is eligible for his or her state pension (Roebuck, 1979). But beyond that practical dividing line, who decides what being classed as an older adult *signifies*—whether that individual is valued for wisdom or disparaged as out of touch? Who decides whether one’s approach to aging is positive or negative? By what measure? Timonen (2016) writes, “All descriptors of adult life stages are fundamentally socially constructed. I do not seek to pre-define in a rigid way what ‘old age’ or ‘being old’ means but, rather, approach this openly, pragmatically and inductively” (p. 10). Wenger (2001) very memorably and succinctly identifies the central question surrounding age: “Who are older people, and who are they older than?” (p. 259).

### **Theoretical Framework**

Collins and Stockton (2018) maintain that a theoretical framework “is the use of a theory (or theories) in a study that simultaneously conveys the deepest values of the researcher(s) and provides a clearly articulated signpost or lens for how the study will process new knowledge” (p. 2). Merriam (2009) describes it as the “structure, scaffolding or frame” for the study, with every part of the study being informed by the theoretical framework, like a “set of interlocking frames” (p. 68). Maxwell (2013) defines a theoretical or conceptual framework as provisional explanation about the situation under consideration that provides an overall basis for how the organization) or a spotlight (shining a light on the important aspects of the study). Crotty (1998) sees the need to link epistemology, theoretical perspective, methodology, and method in a cohesive way, providing a “map” that helps explain the world (Deleuze, 1977, as cited in Collins & Stockton, 2018). Dramaturgical theory, related to symbolic interactionism, guided this study.

## Symbolic Interactionism

Symbolic interactionism as a way of thinking about how symbols create and inform identity was developed by George Herbert Mead but named by Herbert Blumer (e.g., 1969) who further expanded on the ideas and put them in writing. Blumer (1969) identifies the three premises that define symbolic interactionism as follows: 1) individuals relate to things based on the meanings those things have for them, 2) this meaning comes out of interaction with other individuals, and 3) meaning is managed through “an interpretive process” with the things encountered (p. 2). Blumer (1969) further identifies what he calls “root images” (p. 6) that “depict that nature of the following matters: human groups or societies, social interaction, objects, the human being as an actor, human action, and the interconnection of the lines of action” (p. 6). In short, groups are “seen as consisting of human beings who are engaging in action,” (p. 6), and “society consists of individuals interacting with each other: (p. 7). Human beings occupy “worlds” that contain “objects” which come about as the result of symbolic interaction, and can be physical objects, social objects, or constructs/abstractions.

Individuals also have “selves,” and these selves are constantly acting. They can be the objects of their own actions. A person “can recognize himself, for instance, as being a man, young in age, a student, in debt, trying to become a doctor, coming from an undistinguished family and so forth” (Blumer, 1969, p. 12). In taking on these roles, the individual becomes “an object to himself; and he acts toward himself and guides himself in his actions toward others on the basis of the kind of object he is to himself” (p. 12). This having of a self is what allows a person to “interact with himself” (p. 13). We can be angry with ourselves, for instance, or pleased with ourselves; we can remind ourselves of things we might otherwise forget (Blumer, 1969). As a result, every person “confronts a world that he must interpret” (p. 15), and actions

are often conducted in community. In short, those working from a symbolic interactionist point of view see a world of people engaging in

. . . a process of ongoing activity in which participants are developing lines of action in the multitudinous situations they encounter” (p. 20). Regardless of the kind of group under consideration, the activities taking place have been “formed through a process of designation and interpretation. (p. 21)

Redmond (2015) claims that symbolic interactionism qualifies as a theory because of the vast influence it has had over the research of various fields. One of the core tenets of social interactionism comes from Mead’s belief that individual identity comes through social interaction—and that social interaction is what forms society as a whole. Redmond (2015) puts it like this: “Neither the self nor society can exist without the other” (para. 4). Wood (1992) claims that symbolic interactionism allows us “to recognize humans as proactive beings whose control over themselves and their surroundings stems from their ability to interact with and through symbols. Our experiences, knowledge, and relationships are inevitably mediated through our symbols” (p. 17).

### **Dramaturgical Theory**

Dramaturgical theory has been articulated primarily by Goffman in works such as *The Presentation of Self in Everyday Life* (1959). Goffman and other dramaturgists see interactions between individuals in everyday life as similar to the theater, with social interactions being best “understood as a series of performances (Brissett & Edgley, 1990, p. 36). Edgley (2013) claims that “dramaturgy is about the ways in which human beings . . . create meaning in their lives” (p. 2). Goffman (1959) claims that people can be actors or audience members. They take turns in these roles (Benford & Hare, 2015). Within the tradition of symbolic interactionism, dramaturgical analysis focuses on role playing in a variety of contexts (Manning, 2004). For human beings, who gain purpose and a sense of self through their interactions with other people,

“meaning is a continually problematic accomplishment of human interaction, and it is fraught with change, novelty, and ambiguity” (Brissett & Edgley, 1990, p. 2). Warner (1992, as cited in Benford & Hare, 2015, p. 648) notes that the essence of dramaturgy is the way people perform to give versions of themselves to others. Goffman (1961) maintains that “in performing a role the individual must see to it that the impressions of him that are conveyed in the situation are compatible with role-appropriate personal qualities imputed to him” (p. 87). In other words, a teacher should behave like a teacher, a doctor like a doctor, an older person like an older person.

Goffman (1959) points out that people are curious about each other and attempt to find out as much about others as they can to allow them to what to expect and how to act. We use what Goffman calls “sign-vehicles” (p. 1) in making these determinations, taking clues related to prior experiences with similar individuals and often utilizing “untested stereotypes” (p. 1) in their assessments. People, knowing that they are being judged, attempt to manage the impressions they “give” as well as those they “give off” (p. 2). Goffman differentiates between these by saying that impressions given are managed through “verbal symbols or their substitutes” (p. 2) which are used intentionally. Impressions “given off” are those that go beyond the narrow definition of widely understood symbols and that can be treated as “symptomatic of the actor” (p. 2). People are often placed in unfamiliar or ambiguous social situations in which they have to determine what their role is and how best to embody it (Goffman, 1959). Brissett and Edgley (1990) see the flexibility of dramaturgy as a theoretical perspective to be a positive feature, writing: “. . . we believe it is precisely because dramaturgy is not a closed theoretical position, but rather a way of describing human behavior, that it is such an informative and heuristic mode of thought” (p. 24).

## Theory Applied to the Current Study

Every individual performs a “social role” which is “a coherent set of activities that is recognized and judged by others as something apart from the individual who happens to fill it” (Havighurst & Albrecht, 1953, p. 43). Specific “old people’s roles” tend to be preferred by society. These include taking an interest in grandchildren and great-grandchildren, as well as taking pleasure in life, wintering in warm climates, pursuing hobbies and interests, and being socially engaged (Havighurst & Albrecht, 1953). Caring for children and disabled family members is also encouraged, along with volunteering (Timonen, 2016). Of course, participation in any of these endeavors requires “continued health and independence in later life” (Dosman et al., 2006, p. 413). Because old age and aging are socially constructed concepts, with associated meanings that are not biologically determined—including “vigorous, healthy people as well as those so feeble that all their bodily needs must be cared for” (Havighurst & Albrecht, 1953, p. 9)—and that in the United States are often stigmatized (Achenbaum, 2015), it is likely that those who fear being perceived as “old” may “perform” for impression management (Goffman, 1959), and may feel pressured to appear youthful (Jeske, 2016).

Older adults living in a 55+ active adult master planned community—those who are economically secure and released from the pressure of working for an hourly wage, for instance—are as likely as any other group to try to develop positive impressions of themselves, both for the benefit of others and for their own self-concept. The role of activity, along with the concept of being an “active older person”—one for whom “getting older is really quite wonderful” (Jeske, 2016, p. 328)—seem central to the ways older individuals with the financial means to comfortably support themselves make meaning of the process of aging, in which success is often seen as staying “active in areas ranging from careful selection of hobbies to remaining sexually appealing” (Timonen, 2016, p. ix).

## Methodological Framework

I used a case study approach (Creswell, 2013; Merriam, 2009; Stake, 1995; Yin, 2014). I further define the case as *instrumental* (Stake, 1995), meaning that the interest lies within a social issue that is larger than the case itself. Stake (2006) writes, “When the purpose of case study is to go beyond the case, we call it ‘instrumental’ case study” (p. 26). This is done to “illustrate an idea, an issue” (Stake, 1994), p. 34). The case study is a remarkably flexible research methodology. This fluidity allows for a wide range of approaches, and at least one writer sees an underlying philosophy that guides the methodology. According to Stake (1978), case studies are often “the preferred method of research because they may be epistemologically in harmony with the reader’s experience and thus to that person a natural basis for generalization” (p. 5). He felt that case study mimics the ways people use to investigate phenomena in their ordinary lives.

In this concept, Stake draws on the work of Dilthey (1920, as cited in Stake, 1978) who argued that the ways we study social situations should be based on the natural ways people observe and comprehend their surroundings and experiences. A study of human beings is only relevant and helpful if it is “founded on the relations between life, expression, and understanding” (Stake, 1978). Case study, according to Stake and others, relies heavily on tacit knowledge rather than propositional knowledge—this is knowledge that comes directly from experience. It is further defined, not by the methods used, but by the interest in individual cases (Hyett et al., 2014), and uses “a palette of methods” (Stake, 1995, pp. xi–xii). Flyvbjerg (2011) writes, “Much of what we know about the empirical world has been produced by case study research, and many of the most treasured classics in each discipline are case studies” (p. 302).

Because case study involves looking so deeply at a particular thing (a “bounded system,” Smith, as cited in Stake, 1995, p. 2), it is perhaps ideally suited to offer generalizations.



Flyvbjerg (2011) points to its long history and depth, detail, richness, and completeness as particular strengths, noting that a common misconception is that a single case cannot generalize. The use of multiple methods in case study is an added strength: the more data sources you use, document, and analyze, the more your conclusions appear to have weight, and demand to be taken seriously. Some fine non-fiction books are case studies: *Evicted* (Desmond, 2016), *Methland* (Reding, 2009), and *Billionaire Wilderness* (Farrell, 2020) are examples I have enjoyed. While some scientists are uncomfortable with subjectivity in naturalistic inquiry, Abma and Stake (2014) maintain that “even natural scientists—rely on personal feelings of confidence, awareness of consistency, and observation of particular cases to arrive at an explanation” (p. 1158). Furthermore, “engaging with the case will lead to an understanding that is deeper than would be the case if there were an element of detachment” (Abma & Stake, 2014, p. 1158).

Three authors are closely linked with the methodology (Yazan, 2015). These are Robert Yin, Sharon Merriam, and Robert Stake. Yin (2014) is the most highly structured of the three main case study methodologists, and he advocates for a rigorous approach to attain results that can be usefully applied to other contexts and situations, using a variety of methods to reduce potential bias (Yazan, 2015). Merriam (1998) is also detailed in her approach to case study design and focused on generalization as “the process of making sense out of the data . . . the process of making meaning” (p. 198) and giving the reader enough detail that the conclusions “make sense.” Her emphasis on procedures allows for a high level of trust—readers can see how certain conclusions were drawn and determine whether these can be applied to their own situations (Yazan, 2015).

Stake (1995) is less structured than either Yin or Merriam and contends that the real business of case study is particularization rather than generalization. He is interested in the case

for what it reveals about its own complexity and calls each case a “a specific, a complex, functioning thing” (p. 2). He favors flexibility in design, allowing researchers to change as they go, focusing on teasing out complexity and allowing the inquiry to unfold as certain concepts become clarified. He does not even specify when data collection should occur or outline how a researcher would know it has started. He includes the concept of informal observations and impressions as part of data collection, which might be a drawback for generalizability for certain type of reader (Yazan, 2015). For Stake, the important matters in interpreting case study are these questions: “Are we developing the interpretations we want?” and “Do we have it right?” (Stake, 1995, p. 107). Despite his more flexible approach, he does argue for the “search for accuracy and alternative explanations” along with “protocols which do not depend on mere intuition and good intention” (Stake, 1995, p. 107). He maintains that qualitative researchers have an obligation to “minimize misrepresentation and misunderstanding” (p. 109). He also encourages finding ways to confirm conclusions and insights and to show that an interpretation is based on real evidence and not researcher bias.

### **Rationale for Using Case Study**

For the purposes of this research, case study seems ideal. It focuses on a bounded system and allows for a variety of methods and data to address the research questions (Schramm, 1971). The case is one community and explores complex topics in a real-life context (Yin, 2014). The sources of evidence were: 1) interview transcripts, 2) field notes; 3) participant activity journals, 4) survey items, 5) written documents/artifacts, and 6) photographs.

It is, however, reasonable to ask why I chose to use case study methodology rather than another qualitative method, such as ethnography. Case study, as method that encourages a wide range of methods that sees itself as “a part of scientific methodology” (Stake, 2005, p. 406, as cited in White et al., 2009, p. 21) was chosen because of my commitment to a pragmatic

approach that in this study relies on both interview and observation as well as survey methods. Williams (2007, as cited in White et al., 2009) points to three positive qualities of case study research:

1. It allows you to gather rich, detailed data in an authentic setting.
2. It is holistic and thus supports the idea that much of what we can know about human behaviour is best understood as lived experience in the social context.
3. Unlike experimental research, it can be done without predetermined hypotheses and goals. (Willis, 2007, p. 240, as cited in White et al., 2009, p. 21)

### **Methodological Considerations for Including Older Adults as Co-Creators of Research**

Chapter 2 provides a more detailed overview of the literature regarding involving older adults in research, both as participants and as co-creators. It is widely acknowledged that participants should be involved in research, and that what is often known as “participatory research” is “an optimal approach to address health, well-being, and participation disparities, specifically in marginalized communities or populations at risk (Suarez-Balcazar, 2020, p. 261). Weil (2015) argues that “older persons should be seen as stakeholders” (p. 725) and actively participate in study design. But even including older adults as participants in research can be difficult, and some researchers specifically exclude older adults even as participants because of “negative stereotypes, perceived lack of competence, complications in obtaining consent, and the additional time needed to include them as participants” (Jacelon, 2007, pp. 64–65).

How older adults are included as co-creators of research is presented on a continuum by Gutman et al. (2014) ranging from “user-led initiatives,” to “users as collaborators,” to “users consulted,” and finally, to “users as recipients” (p. 188). Suarez-Balcazar (2020) maintains that the level of involvement is less important than “the meaning of such involvement and how

communities become co-creators of knowledge by being meaningfully engaged in research” (p. 262). She argues “that when we create truly meaningful partnerships with communities, we are co-creators of knowledge,” recognizing that “people are the best judges of their own realities” (p. 264). Members of communities under study “bring a wealth of experiential knowledge and personal narratives that not only inform our research projects, but also become our research data” (Suarez-Balcazar, 2020, p. 265). They are also instrumental in making sense of the stories told (Suarez-Balcazar, 2020), and are likely to tell stories even when not prompted because storytelling is such a basic human impulse (Mishler, 1986).

While there is evidence that older adults often enjoy participating in research, and studies have made use of their expertise as co-creators, it seems likely that variation exists in desired level of involvement. Many older adults may not have the time or interest for the labor-intensive work of coding interviews, for instance. In this study, I hoped to involve community members as co-creators, but was not certain about how that participation might look. Corrado et al. (2020) point out that a downside of involving older adults in participator research is that they rarely are involved in developing the research question. This is certainly true in this case of this study, where the requirements of the dissertation preclude offering collaboration at the early stages of research. I chose a contextual topic that seemed relevant to the residents, hoping they would find it interesting and that it would allow them to contribute in meaningful ways. Preliminary discussion in the community indicated a high degree of enthusiasm for the contextual topic.

### **Case Study Setting and Participants**

Sequoia Heights (a pseudonym) is a 55+ active adult master-planned community located in the outskirts of the greater metropolitan region of a large city in the Western region of the United States. It contains approximately 1,500 houses ranging in size from 1,300 to just over 3,000 square feet and in price from \$900,000 to more than \$2 million. In addition to these

homes, the property contains about 500 acres of greenbelt as well as an 18-hole championship golf course that forms the central core of the community. The population is estimated at around 2,500. Sequoia Heights has a stated philosophy: “Every day is an adventure and anything is possible,” based on four core principles: *freedom*, *exploration*, *wellness*, and *connection*. It is billed as “an ideal location for active adults” providing a fitness center with physical activities like tennis, yoga, swimming, and weightlifting, along with community social events, concerts, and games, and more than fifty clubs focusing on hobbies such as photography or travel. Much smaller than The Villages, the AARC commonly used as an example of this model in popular culture (e.g., *Active Adults* and *Some Kind of Heaven*), there is little visible evidence of the hedonism reported by Blechman (2009). Sequoia Heights does not in any way resemble a “Disney for adults” (Schuster, 2016). The houses are upscale, the streets eerily quiet. The golf course and fitness center are low-key, in keeping with the culture of the region. Official demographic characteristics for the entire community are unknown.

### **Data Collection**

I collected data during several phases (see Table 1), described as follows:

#### **Pre-Data Collection Phase**

As Stake (1995) points out, where a study precisely “begins” is hard to say. Before beginning the formal study, I spent several months in preliminary discussions with a long-term resident of Sequoia Heights who served as my first gatekeeper (described in Chapter IV), helped me identify potential participants. Since the community has a strict “No Soliciting” policy, I was advised to contact participants through another resident rather than attempting to contact them directly. I provided this gatekeeper with a general description of my research, with the understanding that it still had to be approved by my dissertation committee and receive approval from the Institutional Review Board (IRB) of the University of Northern Colorado before I could

begin data collection. I took field notes to record my interactions with the gatekeeper, since this provided data to help me answer my methodological question on including older adults as co-creators of research. The gatekeeper made several edits to my research description, and these were balanced with the expectations of my doctoral committee and the IRB.

**Table 1**

*Data Flow Chart for the Four Phases of the Study*

Phase	Contextual		Methodological	
	Data	Analysis	Data	Analysis
Pre-Data Collection			Field notes	Thematic Narrative
Interview	Activity journal	Descriptive Thematic	Field notes	Thematic Narrative
	Interview transcripts	Thematic Narrative	Interview transcripts	Thematic Narrative
	Field notes	Descriptive		Thematic Narrative
Survey Creation/ Dissemination	Survey items Activity list	Descriptive	Communications Field notes	Thematic Narrative
	Survey responses			
Participant Validation	Interview summary checks	Descriptive	Communications	Thematic Narrative

### **Interview Phase**

Based on feedback from the gatekeeper indicating he had identified nearly 40 potentially participants for the study (he received more affirmative responses than anticipated), I decided that up to forty participants (minimum of 10-12) would be selected for activity journal

completion, which is the first of three qualitative data collection points, which include: 1) completion of a 14-day activity journal (required for inclusion in the study), 2) semi-structured interviews of about 90 minutes (required for inclusion in the study), and 3) participant observation/informal interviews (optional depending on participant willingness and availability). I planned to select 10–12 of those who had completed activity journals for in-depth interviews. Far fewer than 40 potentially participants contacted me initially and, of these, even fewer followed through with the study by completing the activity journal. I ended with 16 participants after engaging another gatekeeper for additional recruitment. Because the actual number was close to the number I wanted to interview (10–12), I decided to interview all of them.

Once a participant agreed to the study and I had IRB approval to begin data collection, I sent the participant a demographic survey based on recommendations from Hughes et al. (2016) that included: 1) gender, 2) age, 3) ethnicity and race, 4) education, 5) disability, 6) employment, 7) relationship status, 8) religion, 9) social class, and 10) annual income. (See Appendix B for demographic items.) I also send a formal recruitment letter (see Appendix C for recruitment letter), a consent form, and a 14-day activity journal. These materials were provided either as hard copies sent through the postal service or as PDFs delivered by email, depending on the participant's preference. I completed research journal entries on the qualitative portion of data collection, including instances of confusion with the task or the instructions.

### ***Activity Journal***

Twenty-seven participants contracted me as a result of my work with the original gatekeeper. Two declined to take part since they were preparing to move. One declined because of a belief that they had nothing of value to offer. Two were excluded because they no longer lived in the community. Twenty-two participants received recruitment letters, activity journals, and consent forms. They received instructions to fill out the 14-day activity journal by briefly

recording all “activities” they participated in, indicating whether the activities took place within Sequoia Heights or outside, how they felt about those activities using a three-point Likert-type scale (3 = Enjoyed; 2 = Neutral; 1 = Did Not Enjoy), and a summary of their satisfaction with their 14 days along with any wishes or regrets—anything they would have liked to have done instead (see Appendix D for instructions for the activity journal and Appendix E for the layout of the activity journal). Three men indicated immediately that their wives would not be participating. Six never responded after receiving materials. One responded to a reminder to say they had forgotten to complete the journal. One provided a list of typical activities but did not complete the journal. Two cited multiple personal and health reasons and opted out. One cited travel as a reason for opting out.

Not everyone responded promptly to the recruitment letter and other materials. In the end, eight participants from the original group provided by the gatekeeper completed activity journals and nine participated in in-depth interviews. While securing the participation of these individuals, I decided another gatekeeper might be useful in recruiting additional participants. Twelve more participants were contacted and provided with recruitment letters, consent forms, and activity journals. One opted out because they did not want to complete the activity journals. Two opted out for no given reason, with apologies. One was excluded when it became evident that they did not live in the community but was a frequent visitor. One started the activity journal but did not complete it. A total of seven participants joined the study from the second gatekeeper. One participant was selected personally by me.

Non-responsive participants received up to three reminders, unless they declined to participate earlier. In all, sixteen participants completed an activity journal and were scheduled for in-depth semi-structured interviews. Seventeen ended up participating in interviews, since



one spouse who had declined to participate citing busyness, sat in on their partner's interview and answered questions.

### ***In-Depth Semi-Structured Interviews***

I scheduled interviews according to participant availability and arranged these either by email or telephone. Fourteen interviews took place in the homes of the participants. One participant chose to have their interview at the Sequoia Heights Clubhouse, and one chose to be interviewed via Zoom. I reviewed activity journals before the interviews as much as possible, although some participants only provided the journal at the beginning of the interview. Interviews focused on the content of the journal and additional information on how they define activity, what kinds of things they enjoy doing, reasons that brought them to Sequoia Heights initially, experiences of retirement (if applicable), experiences of activity during the pandemic, and thoughts about helping researchers develop studies. Interviews lasted anywhere from about 30 minutes to 120 minutes. (See Appendix F for the interview guide.) Questions were piloted with three older adults ahead of time. I took field notes throughout the interview process. The notes provide context on the interview setting and reflections on the relative degree of success of each interview.

### ***Activity Observation/Participation***

At the end of each interview, I asked participants if they would be willing to do an activity with me. We tried to think about what that activity might be and plan for it immediately. I did activities with 13 of the participants. One tried to arrange for me to attend musical events that were restricted to Sequoia Heights members only. One had agreed to a time and place for yoga but had unexpected travel that made it impossible within my time frame. The third

participant completed the interview near the end of my stay, and we were unable to arrange an activity in the remaining time.

I communicated informally with the participants on arranging a time and place to meet for the activity. Activities ranged from stacking bottles of wine, to having lunch, to hiking, to learning to knit, to making beer, to taking photographs. Some activities took place at Sequoia Heights and others off site. The purpose of participating in the activity was twofold: 1) to observe the participant being active, and 2) to allow the interactive nature of the activity to open more possibilities for reflection and insight. We talked during the activities and I “interview” them in a conversational style. I took field notes detailing each activity observation/participation.

### **Survey Creation and Dissemination Phase**

The process of both the creation of the survey, including participant input and suggestions, and the dissemination of the survey to other participants in the community is outlined below.

#### ***Survey Creation***

The survey phase involved the creation of a survey instrument based on the findings from Interview phase. The survey includes basic demographic questions, such as age, gender, number of years living at Sequoia Heights, and whether the individual is still working. One survey item lists common activities identified in the activity journals and interviews and asks participants to rank these in order of their importance. I originally hoped to include participants in developing the list of activities and creating categories. Instead, I did this work myself and provided it to participants for their feedback. Several responded with remarks like, “looks good,” while three put considerable effort into giving feedback that improved the categories.

After confronting a certain degree of difficulty in scheduling interviews, I determined not to rely on subsequent interviews for necessary information. I included a question near the end of the interview asking for suggestions for questions that each participant might think useful on a survey to the wider Sequoia Heights community about activity. Each participant made suggestions for survey questions. I recorded these and later reviewed them for duplicate ideas, as well as questions that were off-topic or unworkable. When a survey draft was completed, the questions were provided to participants, who were encouraged to review existing questions, add new questions, and provide comments and edits. Only a small number of participants provided significant feedback, but it was very helpful. For instance, because of two participants' feedback, I made changes to the proposed activity categories. I settled on a final list of questions and created a Qualtrics survey. Participants appeared to prefer email/electronic access or were indifferent. I completed field notes about the survey development process.

### ***Survey Dissemination***

Participants were sent the Qualtrics link with access to the survey and asked to disseminate it to as many friends or neighbors as they thought might be willing to complete the survey. Fifty-seven responses were provided. I completed field notes about the process of administering the survey.

### **Participant Validation**

Summaries of the informal interviews were provided to participants by email, along with brief instructions. I also sent a photograph of each participant and a photo release form for them to sign and return to me. I wrote field notes on this process. Five participants provided signed photo release forms. Another gave a written assent.

## **Participants**

### ***Selection Criteria and Process***

I identified a well-connected resident of Sequoia Heights who was instrumental in advising me about the best way to approach residents to gain cooperation. He and his wife approached approximately 40 people as potential participants in the qualitative stage. More than thirty initially indicated a willingness to participate. Another well-connected resident was later recruited to identify additional participants. Twelve indicated initial willingness to participate. Participants needed to be current residents of Sequoia Heights. They also needed to be age-qualified, meaning at least 55 years old, or married to an age-qualified resident. There were no other inclusion requirements. Sequoia Heights itself requires at least one resident in each house be at least 55 years of age and no one under 18 can be a permanent resident.

Before this study began, I received permission to conduct the study from the Institutional Review Board (IRB) of the University of Northern Colorado (see Appendix G for IRB approval). As soon as this was approved, I began to email or post recruitment packets to everyone who had indicated a willingness to participate. These included a letter explaining the study, an activity journal with instructions, a demographic survey, and a consent form (see Appendix H for the Consent Form for the interview phase). I began to receive responses from some participants immediately; others took much longer to respond if they responded at all. I had three interviews scheduled when I arrived at Sequoia Heights on June 18, 2021. The rest were arranged over the following five weeks. Participants to be interviewed were given the opportunity to select a pseudonym. Each chose instead to use their own first name. Identities of participants who took the survey were kept anonymous, meaning that even I do not know who they are. Consent for taking the survey was included as a paragraph on the survey instrument.

I kept appropriate levels of contact with participants involved in the interview phase, by email, telephone, and face-to-face meetings, and used these contact methods to arrange interviews and activities with participants. I used email to provide them with the final list of activities, along with activity categories and pilot survey items for their assessment, and to validate interview summaries. Finally, participants completed a survey. This was administered through an email link provided by participants who had been involved in the survey creation.

### ***Potential Benefits to the Participants***

Each participant in the interview phase received a \$25 gift card to the club restaurant as a token of appreciation for their participation. At the end of each interview, I reminded participants of the promised gift card and gave them a choice—a gift cards for use at the on-site bistro or an option of their choosing. I recorded their preferences and, after I had completed the interviews and returned home, I created thank-you cards with a photo depicting the community and sent a handwritten note to each participant with their preferred gift card enclosed. All but three participants chose a gift card from the on-site bistro, with one frequent diner commenting, “This will keep me fed!” While most participants expressed appreciation for the gesture, each agreed that financial incentives had no bearing on their decision to participate in research. This likely reflects the affluent nature of the community. People can afford what they need and, moreover, they can afford to use their time in whatever way they choose. Non-monetary benefits may have included enjoyment in helping to create research and developing a better understanding of how activity provides meaning in the lives of residents, which could result in innovations in connecting with residents. The mere involvement in the research may have provided a benefit. Phoenix and Orr (2014) maintain that pleasure can result from “the process and outcome of

documenting one's activity" (p. 97). Survey participants did not receive an incentive but may have benefited from the opportunity to share their views.

### ***Consent Forms***

I asked participants in the interview phase, who had agreed to fill out activity journals, participate in interviews and activity/observation, to complete a consent form describing the research, outlining their involvement, stating the risks and benefits of participation, and providing a list of rights for participation such as the ability to withdraw at any time for any reason. Later participants who were asked only to complete a survey indicated their willingness to participate by completing the instrument.

### **Questions and Processes**

#### ***Questions***

Questions focused on reasons for choosing to live in a 55+ active adults master planned community, ideas about retirement and aging, how participants define "activity" and what it means to be an "active" person, and questions about types of activities they engage in and what these mean to them, as well as thoughts about aging and retirement, activity in the community, and changing to activity during the COVID-19 pandemic. Some questions were included in every interview; were addressed implicitly during the conversation. In addition to the contextual questions about activity, I asked participants about their feelings regarding co-creation of research, which I briefly described and typically labeled "helping researchers do research.

#### ***Processes***

Each participant in the interview phase was provided with a journal to keep a 14-day record of everything they did that they would consider to be "an activity." They were also instructed to give each activity a rating on a 3-point Likert-type scale (3=Enjoyed, 2=Neutral,

1=Did not enjoy). There was space in each journal to provide a short summary of the day, including activities that were planned but not done, etc.

Participants were provided with reminders about their journal entries as appropriate. Some immediately contacted me with questions and other indicators that they were working on the journals and provided completed journals promptly at the end of the fourteen-day period. When the 14-day period was over, I contacted them either by email or telephone to collect the journals and set up individual interview appointments. (Some contacted me as soon as they had finished their journals.) Interviews lasted between 35 and 100 minutes and focused on questions about activity and co-creation of research. Interviews were done face-to-face and via Zoom, according to the preferences of participants. Interviews were audio recorded and transcribed.

Participants who were interviewed were asked to choose an activity we could do together. We arranged a time and place to meet for the activity, usually toward the end of the interview. Activities were not recorded, and I did not take notes during the activity. I gave it my full attention and wrote field notes soon after the activity was completed.

When activity journals, interviews, and activities were completed, I compiled a list of potential survey questions suggested during interviews into a draft survey to administer to a wider group of Sequoia Heights residents. I sent the draft survey to all those who participated in the qualitative phase for their feedback. After making necessary edits and rewording items for clarity, I created a digital version of the survey in Qualtrics and sent a link to each interview phase participant, asking them to take the survey themselves and pass the link on to any friends of neighbors, residing in Sequoia Heights, that they thought might be willing to complete the survey. A portion of the survey provided broad categories of activities arising from activities listed in the activity journals. Respondents were asked to rank them in order of preference.

Questions were included about activity in general and about participants' views on using their expertise to help create research.

Participants who were interviewed had the opportunity to read summaries of their interviews and to offer feedback and corrections (member checking), with the possibility that these might provide an additional source of data. Most participants responded with quick affirmations, stating that the summaries were correct. A few offered minor corrections to basic facts. Two asked for excisions of material they considered overly negative or that they feared would be perceived as critical of the community. Two others asked who would see the material, concerned about the same issue, and I promised not to attribute potentially negative remarks. One contacted me on more than one occasion to engage in greater dialogue about the study. This participant asked for more information about co-creation of research and changed his views about it through our dialogue, becoming more positive.

### **Data Analysis**

Interviews, diary entries, and other qualitative data were analyzed using thematic analysis which can consist of up to six phases: 1) becoming familiar with the data, 2) developing preliminary codes, 3) finding themes, 4) going over themes, 5) naming and providing definitions for themes, and 6) writing about the themes (Braun & Clarke, 2006). Survey data provided descriptive statistics along with thematic analysis of open-ended items.

### **Pre-Data Collection Phase**

During the unofficial period of the study, before data collection originally began, I wrote research journal entries about the process of beginning the study through collaboration with the gatekeepers. I used this material to provide descriptions of early work with gatekeepers.



## Interview Phase

Fourteen-day activity journals were analyzed through: 1) compiling a list of activities done, 2) looking at omissions and reasons for omission, 3) developing categories of activity, and 4) thematic analysis of open-ended responses. Semi-structured interviews were recorded and transcribed. These, along with field notes based on participant observation during an activity, were analyzed by “creating labels (codes) that can be applied to data in order to develop data into meaningful categories to be analyzed and interpreted” (Blair, 2015, p. 19) so the reader can judge the value of the insights derived from the participants’ words and feelings. A “code,” it is important to note, is “most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data” (Saldaña, 2013, p. 3). The data coded can be anything from a full page to a single word—even an image or video (Saldaña, 2013). Coding is the “critical link” between data and interpretation (Charmaz, 2001, as cited in Saldaña, 2013, p. 3); it allows a researcher to uncover meaning. Where stories comprised part of the data, narrative analysis was used as is advised in situations where “individuals knitted together several themes into long accounts that had coherence and sequence, defying easy categorization” and the researcher would rather not break these up into thematic chunks (Riessman, 1993, p. vi).

The thematic analysis relied on open coding, an emergent strategy in which codes are taken from the text rather than imposed on it *a priori* (Glaser & Strauss, 1967; Stemler, 2001; Strauss & Corbin, 1998). It follows the three stages in the process of creating grounded theory recommended by Strauss and Corbin (1998): *open coding*, *axial coding*, and *selective coding*. I initially coded “conceptually similar events/actions/ interactions” (Corbin & Strauss, 1990, p. 12). Next, I further refined the categories through axial coding which helps “to form more precise and complete explanations” (Strauss & Corbin, 1998, p. 24). Finally, during selective

coding these categories were “organized around a central explanatory concept” (Strauss & Corbin, 1998, p. 161) that can be provide a framework for understanding how residents in a 55+ active adult master planned community experience activity.

### **Survey and Participant Validation Phase**

The 16 participants from the interview stage were asked to provide suggestions for survey items during their interview. These suggestions, along with data provided in the 14-day activity journals and issues that arose in conversations, formed the content for a survey intended for the Sequoia Heights community. After I compiled activity categories and re-worded questions, a draft survey was provided to participants for their suggestions. I described and analyzed this process, along with my field notes and observations, to show how it unfolded.

Surveys collected during the survey phase produced descriptive statistic, including frequencies, means, and standard deviations. Three item asked respondents to rank various activities according to importance, frequency, or enjoyment. Frequencies for an option receiving a first, second, or third place ranking were calculated and combined to determine which options were most highly ranked.

Participants from the interview phase received summarized transcripts of their remarks for their approval. Their feedback is summarized and reported, along with the process of disseminating surveys to the community.

### **Trustworthiness**

Roberts and Priest (2006) write that, “All research attempts a simple vital question: ‘How can I assure the user of my work that it is trustworthy?’” (p. 42). This study benefits from multiple sources of data collection, one of the hallmarks of the case study method. This is known as *triangulation*, a term which originally came from navigation where the method is used to

determine a location using at least two points (The Institute of Navigation, as cited in Heale & Forbes, 2013). In research, the term refers to using more than a single approach or source or data with the aim of increasing trustworthiness of the findings (Heale & Forbes, 2013). Denzin (1989) presents four basic types of triangulation: 1) *data triangulation*, including time periods, space, and people; 2) *investigator triangulation*, which includes using several researchers; 3) *theory triangulation*, which calls for more than one theoretical framework; and 4) *methodological triangulation*, which requires using several data collection methods (p. 301). I used both data and methodological triangulation, relying on different forms of data collection (interviews, observation, field notes, artifacts, survey responses) to present competent findings. The study is strengthened by alignment of findings from interviews, observation, and survey items.

Korstjens and Moser (2018) provide a useful table to incorporate the recommendations of Lincoln and Guba (1985) to focus on: 1) credibility, 2) transferability, 3) dependability, 4) confirmability, and 5) reflexivity. I have borrowed their structure for this study (see Table 2). As the table shows, credibility was enhanced through prolonged engagement, persistent observation, triangulation, and member checks. Transferability was enhanced through thick description. Dependability was increased through my researcher diary which provided a clear audit trail (Lincoln & Guba, 1985, pp. 318-319), and incorporated Halpern's (1983, as cited in Cutcliffe & McKenna, 2004) six categories of information: 1) raw data, 2) data reduction and analysis products, 3) data re-construction and synthesis products, 4) process notes, 5) materials showing intentions, and 6) instrument development information. Reflexivity occurred through the research journal also. The study has a natural peer review process since the research committee contains four methodologists, one of whom is a specialist in gerontological methodology. The inclusion of participants as co-creators in the research process adds additional credibility to the

process. Participants were able to check summaries of their statements and provide other forms of feedback, which is how I achieve transparency, honesty, and integrity.

**Table 2**

*Methods Used to Increase Trustworthiness (Korstjens & Moser, 2018, p. 121)*

Criterion	Strategy	Definition
Credibility	Prolonged engagement	Spending significant time in the community.
	Persistent observation	Paying attention to the context at all times.
	Triangulation	Using multiple data sources and methods of data collection.
	Member checks	Verifying content and allowing participants to modify or expand upon previous answers.
Transferability	Thick description	Describing words and context in rich detail.
Dependability/ Confirmability	Audit trail	Transparency in data collection.
Reflexivity	Researcher diary	Reflections on the research process.

### **Survey Validity and Reliability**

This was a pilot survey, intended primarily as a vehicle for determining how co-creation of research might work in a 55+ active adult master planned community. Asking individuals to complete surveys is a common form of data collection (Taherdoost, 2016), and one that naturally raises issues of validity and reliability (Alwin, 2010). Validity is the extent to which a measurement accurately captures the construct of interest. As Cronbach (1971) pointed out, “One validates, not a test, but an interpretation of data arising from a specific procedure” (p. 447). While in the past, scholars have thought in terms of different “kinds” of validity, Cizek et al. (2008) point to a “growing consensus that validity does not exist as separate ‘kinds,’ but that

validity is of a single nature” (p. 398). If there is confusion regarding validity, there are also problems with the way many people think about reliability. Frisbie (2005) notes that validity and reliability are often confused for each other and that even when properly distinguished, they are often used in ways that demonstrate “limited views of how to use the two ideas” (p. 25).

Reliability is “the extent to which a particular test, procedure, or tool (such as a questionnaire) will produce similar results in different circumstances, assuming nothing else has changed” (Roberts & Priest, 2006).

Alwin (2010) points to several assumptions that are often made when researchers collect data through surveys. These are: 1) assuming the questions are “appropriate and relevant (p. 406),” 2) assuming respondents understand the questions, 3) assuming those responding know the answers, 4) assuming they can remember the answers, 5) assuming they have sufficient reason to give good responses, and 6) assuming response categories allow for adequate responses. While the survey used in this study is in its early stages, I can make several arguments for its validity and reliability. First, the questions were either suggested and developed by members of the target group, older adult residents of a 55+ active adult master planned community, or they were developed from data drawn from extensive interviews with research participants. Items focused on the kinds of activities members of the community most frequently do or enjoy came directly from activity journals reporting the kinds of things community members do. The results of the survey were similar to findings from interviews and observation.

### **Member Checking**

Since qualitative research, like all research, is open to potential bias, one fear is that a researcher might dominate the findings of a given study, skewing them in favor of his or her own personal beliefs at the expense of the true perspectives of participants (Mason, 2002). Member checking provides the opportunity for correcting errors and unfounded assumptions (Miles, et al.,

2014), and allows for participants to give “an accurate reflection of reality” as they see it (Cho & Trent, 2006, p. 322). Beyond confirming accuracy, member checks can also be used to achieve greater meaning making through reflection and dialogue (Candela, 2019), which is a purpose that seems more wholly in line with the aims of naturalistic inquiry, as do the potential emotional benefits to both the researcher and participants that can come from member checking (Doyle, 2007; Rager, 2005), with participants sometimes finding resonance with those in similar situations (Koelsch, 2013). There are also issues surrounding the sharing of power in research that can be addressed by leveling the production of knowledge and creating “opportunities for empowerment by those involved” (Dorant, 2020, para 1), acknowledging that it is important to share power between researchers and participants, who have specialized knowledge that is necessary to the research. But there are important questions around the practice. Does it really help to increase trustworthiness, and, if so, how?

In this study, I had originally planned to do follow-up member checking interviews. Difficulties in scheduling interviews caused me to revise this plan and instead I emailed participants summaries of their interviews, asking them to give me feedback. While many simply agreed that the summaries were accurate, others made small changes. In some cases, reading the summaries caused participants to re-think previously held positions, becoming more open, for instance, to the idea of co-creation of research. Others made comments like, “I didn’t realize I talked so much,” or “I hope I didn’t sound too negative about the community or my neighbors.” Member checking appears to offer a strong form of validation, giving participants the chance to make certain that their answers are a “true” reflection of their thoughts and feelings.

### **Ethical Considerations**

Since the Doctors’ Trial at Nuremberg in 1947, ethics in research has been a topic of concern, with efforts made to ensure that human subjects involved in research are not subjected

to physical or psychological harm. The Belmont Report (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979) was prepared with the express purpose of protecting human subjects and focuses on three overarching principles: respect for persons, beneficence, and justice. Despite the concentration on ethics over the past seventy years, a surprising number of unethical studies have been identified, including the Tuskegee Syphilis Study, the Milgram Experiment, the Stanford Prison Experiment, and the Holmesburg Prison Experiments. With the development of new technology and “big data,” research faces new ethical challenges (Fuller, 2017). Lahman (2017) points out that vulnerability is not always obvious; participants can be competent individuals who are nevertheless vulnerable.

I would tend to agree with Stutchbury and Fox (2009), who argue, “All research undertaken in situations which involve people interacting with each other will have an ethical dimension” (p. 489). They also point out that behaving ethically includes not only adherence to rules and guidelines but making sure the research itself has a high level of integrity and that “any ethical decisions are recoverable” (p. 490), meaning they are made within a context of transparency and openness. “Harm” for participants in this study would likely be nothing more severe than tiredness or boredom, but I take both negative outcomes seriously. I do not believe I have the right to pressure someone into using their time in ways that are not productive and joyful for them. (D’Angiulli & Smith LeBeau, 2002), would agree, citing boredom as being of concern, both in terms of ethics and methodology. Sieber (1992) specifically cites “boredom” as a potential risk in research, right along with “frustration, and taking up time that the subject might more profitably spend otherwise” (p. 80). Codó (2008) suggests meeting participants ahead of time to establish a friendly relationship, making the experience comfortable. One of my research advisors, when reading an early draft of this chapter, responded that he often asks older

adults if they need a break or a glass of water during the interview (R. Larkins, personal communication, March 28, 2021).

### **Older Adults as a Vulnerable Population**

Certain vulnerable groups receive special protection under Institutional Review Board (IRB) guidelines. While older people are no longer considered to be among these “vulnerable subjects,” since old age is not necessarily synonymous with cognitive decline, some IRBs still look at them as part of a “protected population” or “potentially vulnerable” (Texas A&M, 2015; University of Chicago, 2016, as cited in Weil et al., 2017). However, Weil et al. (2017) note that “views on inclusion of older persons of all cognitive statuses in research are changing” (p. 196), with a minority of interested parties feeling that research should never be done on older people with cognitive impairments such as dementia. Questions about coercion with older participants remain relevant (Weil et al., 2017).

Among the ethical issues that have potential application to this study are “going too deep” (Weil et al., 2017, p. 203), mixing roles or engaging in dual relationships, and violating confidentiality or consent. Lahman et al. (2011) recommends that researchers formulate an ethical stance that includes answering questions such as, “How do I ensure that importance of the research process is valued over outcomes?” (p. 140). This valuable reflective exercise can be repeated throughout the research process. I had the opportunity to ask myself this question throughout the study. One example is when I received an email in August 2021, after I had sent requests for feedback on the draft survey to participants and one wrote back saying she had not understood the extent of her commitment. While I was concerned that she might withdraw her consent, I knew the ethical way to proceed was to apologize for the misunderstanding, clearly outline remaining steps in the research process, and offer her a gracious way to withdraw, while



maintaining our positive relationship. This approach was successful, and she remained in the study, albeit as a mostly silent partner.

This kind of experience does not seem unusual. Ngozwana (2018) relates conducting a focus group with older adults who gave various signals indicating that they were tired or did not want to continue with the study. The researcher confesses, “I was in fear that if I allowed for a break, they might not come back” (p. 26). I did not want participants to feel unhappy about their participation. When they seemed reluctant to be involved in a certain aspect of the study, I gave them ways out to avoid embarrassment. I hope most would say of their involvement in this study, “It was well worth the effort” (Dahlin-Ivanoff et al., 2019).

### **Findings Presentation**

In addition to presenting the research findings in this dissertation, each participant received a brief executive summary of the main findings of the contextual portion of the study, which focuses on the meaning of activity for older adults living in a 55+ active adult master planned community. I did not include a summary of the results on co-creation, since they entered the study primarily interested in the contextual aspect. I also have plans for presentations and publications as follow:

### **Methodological**

- 1) The Role of Gatekeepers in Recruit in a 55+ Active Adult Master Planned Community
- 2) Participant Observation in a 55+ Active Adult Master Planned Community
- 3) Methodological Considerations for Involving Adults as Co-Creators of Research
- 4) Survey Co-creation with Older Adults in a 55+ Active Adult Master Planned Community

**Contextual**

- 1) The Definition of Activity for Older Adults in a 55+ Active Adult Master Planned Community
- 2) A Walk in the Woods: How Location Affects Activity for Older Adults in an Active Adult Master Planned Community
- 3) How a 55+ Active Adult Master Planned Community Contributes to Activity
- 4) A Visual Study of a 55+ Active Adult Master Planned Community

**Summary of Chapter III**

In this chapter I have explained my researcher stance, along with the epistemology, theoretical framework, and methodological framework that guide this study. I have further described the setting and participants, as well as the data collection protocol, and data analysis procedures to be used. Trustworthiness, member checking, ethical considerations, and a description of how findings will be presented have also been discussed. The following Chapter Four will describe the findings. Finally, Chapter Five will be a discussion of the dissertation, including implications of the findings and suggestions for future research.

## CHAPTER IV

### FINDINGS

Dad and I stop for fish and chips on our way from the airport to Sequoia Heights, an affluent 55+ active adults master planned community where I will spend 6 weeks studying co-creation of research with older adults and the meaning of activity for older adults. It is the Friday before Father's Day. The drive from the large international airport that serves the region takes about 45 minutes without traffic. A major interstate highway heading north, toward Canada, exits to a state highway headed east, toward a mountain range. We pass strip malls, shopping centers, condos, houses, parks, a baseball diamond, a major software company.

A slight right turn moves us beyond the bustle of suburban life. Barns, fields, horses, eggs for sale. A sprawling country forest. A shopping complex at the main intersection is anchored by a supermarket, with the ubiquitous Starbucks, McDonald's, Wells Fargo, and 24-Hour Fitness rounding out the offerings. A British-style pub, a Thai restaurant, a Mexican restaurant. A real estate agent, veterinarian, UPS, a preschool. A left at the intersection brings us to a cylindrical brick tower emblazoned with the name "Sequoia Heights" and spouting water into a pond edged with lilies, magnolias, roses, and irises. We pass through a winding golf course. The clubhouse, fitness center, tennis courts, and a children's playground are to the left, past a decorative pond/waterfall/rock combination and trees that flower pink in the spring. We turn right. Tall evergreen trees, perfectly kept houses. Right turn. Golf carts lined up and headed to the green. Couples walking dogs. Women speed walking in pairs. A lone cyclist.

Just a hundred yards ahead of my father's house is an open meadow thick with blackberries and huckleberries leading to a short, wooded trail providing access to another street. This area attracts wildlife in abundance. Deer are everywhere, especially at dawn and dusk. My father has photographed a bobcat in his backyard. A few weeks later, I find bear scat on this trail. Just a day before I arrive, my father's next-door neighbor sends a video to the other residents in this section of the community showing a bear carefully balancing on the rail of her deck and drinking from a hummingbird feeder. But there are no bears today, My father unlocks the front door of his 1,600-square foot house—one level, two bedrooms.

My mother does not appear at the door, smiling, in her wheelchair. She died of Parkinson's disease nine days earlier. Dad and I hug each other and cry. An hour later, I'm on the back deck of a neighboring house, arranging an interview time. The day after the interview, I am driving my highly active father to a routine surgery that ends up taking all day, and two days after that he is in the Emergency Room having a stroke. Fortunately, he recovers almost immediately, with no ill effects and is back to his normal active lifestyle. Still, I am reminded of a quote from *Everything Happens for a Reason: And Other Lies I've Loved* by Kate Bowler (2018): "Life is a series of losses." I will be reminded repeatedly. There is the participant whose wife dies just weeks before our interview, the interviews cancelled because of cascading health problems, the many cherished activities abandoned as aging takes its toll and as a worldwide pandemic forces lockdowns and restrictions. I will also witness resiliency, adaptation, and salvaging. People make the best of what they have left. They learn and grow. As one participant, put it, "I have community . . . , and my community is getting larger. I've learned to do different things, like I've learned to play poker. I've learned to play Mahjong. I joined the mountaineers. I learned to snowshoe and hike."

### **The Meaning of Activity for Older Adults With a Methodological Focus on Co-Creation of Research**

This research study has a primary methodological focus on involving older adults in a 55+ active adult master planned community as co-creators of research. The contextual focus is the meaning of activity for older adults in a 55+ active adult master planned community, and I specifically examined what the research participants reported as “activities,” how they define “activity” or an “active person,” and which activities were preferred by residents. I also explored reasons participants chose to live in an age-restricted community, the role of the community in facilitating activity, the effect of the COVID-19 pandemic on activity, and other impediments to activity that come with age. Sixteen participants filled out 14-day activity journals. I reviewed each journal before conducting in-depth interviews with each participant, and had an additional participant join in an interview (another participant’s partner). In most cases, we selected an activity the participant enjoys and did that activity together. Participants provided suggestions for questions for a survey intended for the wider Sequoia Heights community. Additional items came primarily from activities listed in activity journals, which I categorized with input and approval from participants. They reviewed survey drafts and provided suggestions. Finally, they distributed the survey to other residents within the community, resulting in 57 responses.

In this chapter I provide descriptions of the 17 interview participants and the activities we did together, as applicable. Subsequently, I address each of the research questions. Research Question 1 (“What are methodological considerations for including older adults in a 55+ master planned community as co-creators of research?”) is addressed through answers to interview questions about participating in research, along with my observations of the process of co-creating research with residents of a 55+ active adult master planned community. This includes

detailed descriptions of the processes of recruiting participants and collaborating with them as research co-creators producing and disseminating a survey. Original question suggestions along with the final survey produced through the collaborative efforts between the participants and me are presented in this chapter. Where applicable, I reference field notes taken throughout the research process that provide context and insight into how the study was conducted. Research Question 2 (“What is the meaning of activity for older adults in a 55+ active adult master planned community?”) is addressed through interview and survey responses about 1) the definitions of “activity” and what it means to be “an active adult,” 2) reasons for choosing to live in an age-restricted community, 3) community contribution to activity, 4) perceptions of aging and retirement,) the effect of the COVID-19 pandemic on activity, and 6) other impediments to activity. A comprehensive list of activities reported by participants in their 14-day activity journal is included, along with data from the co-created survey that applies to this research question. Research Question 3 (“Which activities do older adults in a 55+ active adult master planned community prefer?”) is addressed through survey responses from 57 participants and interviews with 17 participants about the things they prefer doing. Table 3 showing demographic characteristics of both interview and survey participants. **Note:** Some interview participants also completed the survey.

**Table 3***Summary of Participant Demographic Characteristics*

Characteristic	Interview Participants <i>N</i> (%)	Survey Participants <i>N</i> (%)
Age	73.46 ( <i>M</i> )	73.9 ( <i>SD</i> = 7.4)
Gender		
Female	11 (64.7)	33 (58)
Male	6 (35.3)	24 (42)
Ethnicity		
White	17 (100)	53 (93.0)
Asian		2 (3.5)
Relationship Status		
Married	11 (64.7)	42 (73.7)
In a Relationship	1 (5.9)	1 (1.8)
Divorced	2 (11.7)	4 (7.0)
Widowed	2 (11.7)	9 (15.8)
Never Married	1 (5.9)	1 (1.8)
Employment Status		
Fully Retired	13 (76.5)	46 (80.7)
Occasional Projects	0	6 (10.5)
Work Full-Time	2 (11.75)	2 (3.5)
Work Part-Time	2 (11.75)	3 (5.3)
Income	\$138,282 ( <i>M</i> )	Not included
Years in Community	9.5 ( <i>SD</i> = 5.4)	9.9
Energy (self-reported)	Not included	38 (66.7)
Introvert		19 (33.3)
Extravert		

**Interview Participants**

I interviewed 17 individuals (see demographic summary in Table 3). Before participating in the interviews, 16 individuals completed 14-day activity journals prior to their interviews. One participant's partner joined in the interview despite not completing an activity journal. Their

insights and contributions complemented those of their partner. The following section provides biographical sketches of the 17 interview participants and the activities we did together, as applicable.

### **Carol**

Carol is 76 years old and had lived at Sequoia Heights for 15 years. She has been married for 55 years and has an adult daughter and a 14-year-old grandson. She characterizes herself as a “Pacific Northwest girl,” who was born in Montana but grew up primarily in Spokane, in Eastern Washington. Her father was a contractor and Carol, who started college at Gonzaga and later transferred to the University of Washington in Seattle, was the first in her immediate family to graduate from college. She calls herself a “late bloomer,” particularly in terms of career since she struggled in school, intending to go to medical school. Bias against women stopped her progress and she studied nutrition and institutional administration instead. Carol and her husband, Bill, moved to Redmond, Washington, in 1969. Their daughter was born in 1972. She became involved in a group that promoted women in STEM classes.

I frequently encountered Carol while walking or running. I brought a brown bag lunch to her house where we watched an online Lunch and Learn lecture on the Holocaust in her study.

### **Dave**

Dave is 76 years old and had lived at Sequoia Heights for 14 years. He was born in Anchorage, Alaska during World War II. At the end of the war, his parents moved to Portland, Oregon, which is where he grew up. He attended Whitman College in Walla Walla, Washington, where he completed his undergraduate degree, and then went on to law school at the University of Washington in Seattle. He always wanted to live in Seattle, where nearly all his family were from. He practiced law there for 37 years. Dave is married to Karen, and they have two adult daughters, both of whom live in the general area—within an hour or two by car. He has one



granddaughter and two grandsons. He has been retired for about 14 years, and is an avid hiker who also devotes considerable time to his grandchildren.

Dave and I took a two-hour hike together through old-growth forest bordering the community. He also introduced me to a favorite activity of his that I completed on my own, walking all the trails in Sequoia Heights (about 15 miles in total) in a single day.

### **Debra**

Debra is 60 years old and has lived at Sequoia Heights for 5 years. She grew up in Oak Ridge, Tennessee, and attended Middle Tennessee State University, where she earned a degree in psychology with minors in dance and English. She met her husband during her senior year of high school. They attended different universities and got married in 1983. She worked as a beauty advisor and general manager in Tennessee and Alabama for 14 years until the family moved to Washington where her husband took a job at Microsoft and Debra began working as a special needs educator in the public school system, a job she still does, focusing especially on applied behavioral therapy, which Deb describes as “basically positive reinforcement for anything that’s correctly done.” When she was 45, Debra did vocational training to do nails. It took six months. “I basically, I did manis and pedis, manis and pedis, manis and pedis until I got the 600 hours. And then I had to pass a state test and a skills test.” She started a spa business with a couple of friends but after a fast expansion over three years, which Debra describes as “too fast,” they had to close the business. She has continued to do nails from her home, part-time, while also working full-time for the school district.

Debra is an enthusiastic trail walker and I encountered her in the forest walking with a friend. She gave me a manicure.

**Dolores**

Dolores is 74 and has lived at Sequoia Heights for 5 years. She was born and raised in San Francisco, went away to college in Portland, Oregon, for two years, and then returned to California to finish her degree at San Francisco State University. She is a speech pathologist by occupation and has practiced in both the United States and England, where she lived for seven years. Not only has Dolores traveled extensively all over Europe, but she also joined her husband, who was in the Merchant Navy, on a tanker that traveled nearly all the way around the world, stopping in different places along the way, for a period of five months. They returned to California when their firstborn daughter was about 18 months old and had two more children, a boy and a girl. When the children were four, seven, and ten, Dolores's husband was killed in an accident at work at the age of 43. Dolores, who was just 39 at the time of his death, moved to Portland, Oregon, to be closer to family, and lived there for more than 30 years. She has four grandchildren, aged seven, ten, eighteen, and twenty.

I went to lunch with Dolores and two other residents at a nearby restaurant that is a favorite. I also had dinner at a resident's home with Dolores as another guest.

**Joan**

Joan is 72 years old and has lived at Sequoia Heights for 10 years. She grew up in Southern California and spent part of her childhood on an avocado ranch. When her parents divorced at the end of her high school years, she ended up as a frequent babysitter for her much younger brother and sister until she left home at the age of 18. Joan describes her college years as difficult, and she struggled academically. She lived in Sweden for a year at the end of college and credits that experience with turning her life around and setting her off on a "learning binge." After college, Joan began work as a teacher and went on to earn a master's degree and a doctorate. She has taught elementary school, developed educational tests, taught special

education, and developed curriculum for math and science that was grade-level appropriate.

After taking early retirement following an injury, Joan found a new passion—sailing tall ships.

She achieved the status of Coast Guard captain and worked with at-risk youth on ships. Joan was in a long-term relationship for 17 years before moving to the Seattle area. She is passionate about conifers and her dog, Brodie.

I interviewed Joan at the end of my stay in the community, due to various injuries and illnesses she'd experienced. Because of this, we were not able to arrange an activity to do together during that time, although I often encountered Joan while she was walking her dog and she showed me her extensive collection of conifers as I was passing by the house one day.

### **Karol**

Karol is 53 and has lived at Sequoia Heights for 5 years. She qualifies for residency, despite being younger than 55, through her husband who meets the minimum age requirement. Karol grew up in a neighboring town and has lived in the general area all her life. She has two adult sons, aged 33 and 26, and a six-month-old granddaughter. Karol has a degree in business management and worked in sales for Microsoft for many years, retiring at the age of 49, not long after her husband retired. They spend considerable time at their property on Lopez Island in the San Juan Islands. Karol also babysits her infant granddaughter two days a week. She enjoys the amenities—especially the trails—at Sequoia Heights but does not have much in common with many in the community because of her relative youth. She anticipates moving to another location within the next few years, depending on where her children end up going.

Karol spends as much of her free time as possible with her granddaughter or on her island property. She and I had arranged to take an on-site yoga class together, but she had last-minute travel plans at the same time.

**Kay**

Kay is 83 years old and has lived at Sequoia Heights for 18 years. She is an only child, was born in Everett, Washington, and spent her early childhood in company towns affiliated with logging industry, returning to Everett for junior high school. She started higher education at a junior college and later transferred to the University of Washington where she met her husband, to whom she has been married for 62 years. Kay was the first in her family to attend college, majoring in home economics. She took a particular interest in textiles and microbiology. She also earned a teaching certificate, and spent 2 years teaching in Missoula, Montana, after she and her husband were married. She later worked as a secretary at the University of Washington until her first child was born, returning to work after their second child was well-established in school and spending several years working in public schools in various capacities. She finished her career as an administrative assistant for a semiconductor manufacturing facility.

I went to dinner with Kay and her husband and another friend at a favorite restaurant. I also accompanied the three of them on a tour of Kay's hometown.

**Lin**

Lin is 81 years old and has lived at Sequoia Heights for 10 years. She was born in St Louis, Missouri, and attended the University of Missouri until she married her childhood sweetheart at the age of 20. They had two children and divorced after 12 years of marriage. Lin later married an architect who was 17 years older; they divorced after 8 years. Lin vowed that she would not marry again, and she has kept that vow, although she does have a partner who lives nearby. She worked in the Seattle School district as a school secretary for 39 years and lived in the same house, not far from Sequoia Heights, for 37 years. She retired at the urging of her son in 2010 and did considerable travel before COVID-19 restrictions started. Lin took classes on decluttering to prepare for downsizing from a large house to the considerably smaller

on she occupies now. She moved to the community because it is near her son and daughter, and her partner, even though she considered a nicer house for less money in another area.

Lin drove both of us through her favorite coffee shop about 15 minutes away for mochas. We returned to her house with the drink, and she gave me a short knitting lesson and showed me some of her handiwork.

### **Mark**

Mark is 66 years old and has lived at Sequoia Heights for 2 years. He also has homes in Chelan, Washington, and Palm Springs, California. Mark grew up in Minnesota and spent most of his summers on a farm in Wisconsin. He studied business administration at college in California and spent his career in sales. Mark has lived in the general area where Sequoia Heights is located since 1982. He has a son and daughter, both in their forties, and two grandchildren, ages 11 and 4. He has been retired since 2020 but still does consulting for one of the businesses he owned before retirement. Mark lost his wife after 42 years of marriage in the summer of 2021. He is the primary caretaker for his mother-in-law, who has Alzheimer's disease.

I spent more than five hours with Mark making beer, one of his hobbies. He made an Imperial Stout. He also gave me a bottle of previously brewed beer along with root beer for my niece and nephew.

### **Michele**

Michele is 74 years old and had only lived at Sequoia Heights for a year and a half when she sold her house and moved to a neighboring town. She grew up in a Navy family and moved frequently, but thinks of her hometown as Lancaster, Pennsylvania, where her grandparents lived. She got married one year after finishing high school, and later went on to college where she completed a degree in business. She and her husband adopted a son and divorced when her

son was six years old. Michele went on to focus heavily on her career, ending up with what she calls “a very interesting job.” She worked in a company that developed engines for the Air Force, managing big sub-contracts, including work on the aircraft known as the Raptor where she managed all the international work. Michele traveled a great deal for her work and retired at the age of 50. She moved to California to live near her brother about the time of the stock market crash, so she ended up going back to work at various prestigious companies in the Bay Area. She finally retired permanently in about 2015.

Michele and I met at a botanical garden in a nearby city and spent about an hour taking photos of the flowers. Both photography and gardening are passions for Michele.

### **Page**

Page is 83 years old and has lived at Sequoia Heights for 16 years. She is originally from Virginia but has lived in the Pacific Northwest since 1976. She and her husband, Neil, who passed away in 2012, were married in 1969 in Hawaii at the Hickman Air Force Base on Oahu. Page, who was a teacher, was teaching first grade at an Episcopal school, where she later served as principal of the elementary school. She met Neil when her apartment manager insisted on introducing them. After Neil retired from the Navy, they returned to his native Seattle where they raised their two children in several houses in suburban communities not far from where Page lives now. They originally moved to Sequoia Heights so her husband could play golf. She has one grandson, a six-year-old boy with whom she spends considerable time, and two step grandchildren in Canada.

Page and I worked on a puzzle, had several meals together—in a restaurant, at her house, and at the home of a neighbor. We also played games with her grandson.

**Pat**

Pat is 75 years old and has lived at Sequoia Heights for 8 years. She worked as a department administrative assistant in several universities and raised two children, who are now adults. Pat and her husband Paul, who have been married for 55 years, have 6 grandchildren. Pat has been actively involved as a board member at Sequoia Heights for many years. She is also highly involved in clubs and travel, including overseas trips organized by community clubs. She is sufficiently busy that she elected to not take part in the study as an official participant but joined Paul in his interview and contributed many useful observations about activity and the community as a whole.

**Paul**

Paul is 75 years old and has lived at Sequoia Heights for 8 years. He is Lithuanian and was born in Germany during World War II, just after his parents had fled Soviet occupation, traveling through Poland and Austria to arrive in Southern Germany. A few years later, the family were sent to a displaced persons camp in Australia and later lived in Melbourne, Australia, before moving to Los Angeles when Paul was 10 years old. He started college as an engineering major at UCLA but later switched to physics. He earned a PhD in theoretical physics and completed several post-docs. Paul married his wife, Pat, shortly before he turned 20. She worked as a secretary. The couple have two adult children and six grandchildren. They came to the area in 2002 to be near their daughter and her family. They originally bought a house in another community, but never felt integrated there. They enjoy the amenities and opportunities to be involved in a wide range of activities at Sequoia Heights.

Paul and I tried to arrange an activity related to the music groups Paul is passionate about, but all the concerts were available to residents only. We were unable to settle on an

alternative activity. He shared a concert video from the community that allowed me to get a sense of the experience of attending in person.

### **Peter**

Peter is 69 years old and has lived at Sequoia Heights for 9 years. He was born in Renton, Washington, and lived in Washington, as well as in Arizona, Florida, Arkansas, and North Dakota. He received a pony for his seventh birthday when he and his family lived on a farm in Arkansas. He has lived in the Seattle area since 1962. He graduated from the University of Washington with a degree in business and worked in securities for ten years and then became a corporate trainer, starting his own business, which he has owned and operated for 36 years. He has been married to Kathleen for 42 years and they have four adult daughters and seven grandchildren. Peter loves to work and hopes that he never has to stop. His was the only interview conducted via Zoom and he was in the middle of a stressful work situation at the time of the interview. We had another chance to speak informally a few weeks later.

Peter and I met at the club intending to play pool. There was a club fair taking place and the pool tables were all occupied. Peter and I visited various booths at the fair and then chatted outside on the veranda. He administered the Harrison Assessment, an instrument that provides feedback on work preferences, to me and provided my results. This is connected to his current line of work.

### **Ray**

Ray is 79 years old and has lived at Sequoia Heights for 10 years. He grew up in a small town in North Carolina and graduated from North Carolina State University with a degree in physics and Brandeis University with a doctorate. Shortly after finishing his education, Ray worked at the Smithsonian Astrophysics Observatory and on National Science Foundation curriculum development. He spent the majority of his career at the Department of Defense where



he worked for 31 years on projects requiring high levels of security clearance and lived in the suburbs of Boston. He is married to Nancy, and they have two adult children and five grandchildren, ages 17, 14, 12, 6, and 4. Ray retired just a few months before moving to Sequoia Heights.

Ray had recently purchased several new wine racks for the specialty climate-controlled wine room he built in a corner of his house. He invited me to help organize and stack bottles on the new shelves, according to variety and vintage.

### **Sharon**

Sharon is 74 years old and has lived at Sequoia Heights for 5 years. She is originally from California, having been born in Glendale and grown up near Sacramento. She majored in home economics in college and taught that subject at the high school level for three years before going to work at her husband's dental practice. She and her husband had two daughters before divorcing in the early 1980s. Sharon went back to school for a master's degree in curriculum and instruction and subsequently taught—mostly second grade—for 24 years at a school in Escondido, California. She moved to the Seattle area to be closer to her daughters, who were both living in the area. While Sharon is retired from teaching, she works part-time in medical billing and offers occasional childcare to her two grandchildren. She is involved with her church and enjoys painting, knitting, spending time with her cat Chloe, shopping with her daughters, and doing light exercise, such as walking and chair yoga.

Our original plan was to go shopping at a local indoor mall, a favorite activity of Sharon's. She had an injury to her foot that made it difficult for her to walk and instead, we went to lunch at a nearby Mexican restaurant that is popular with community residents.

**Stanley**

Stanley is 83 years old and has lived at Sequoia Heights for 18 years. He was born in Enumclaw, Washington, to parents who were originally from North Dakota. He grew up mostly in Naches, Washington, where his father worked for a logging company, but the family moved frequently in his early childhood, between Enumclaw, Naches, and North Dakota. He was valedictorian of his high school class and graduated from the University of Washington in 1960 with a degree in forestry. He worked in Montana, Spokane, and Seattle for more than twenty years before making a professional change that took him to the University of Washington's Pack Forest in 1982. He was College Lands Manager there until his retirement in 2002. During this time, he spent one night a week in Seattle—80 miles away—so he could visit the University campus and keep in contact with faculty and students. He has been married to Kay for 62 years and they have two children. Both he and his wife take full advantage of the many activities offered in the community. Stanley has served as the primary “gatekeeper” for this project, providing access to potential participants and helpful advice.

Stanley, along with his wife Kay and a neighbor, had dinner with me at a nearby restaurant. We also drove out to the location of his wife's family property, a town that is now submerged under water.

**Participant Summary**

This group of participants represents a good mix of genders, ages, professional backgrounds, reasons for moving to a 55+ active adult master planned community, involvement in the community, and types of activities preferred. This was partly the result of careful work in selecting participants by a gatekeeper, and partly the result of luck.

## **Methodological Considerations**

The first research question was, “What are methodological considerations when involving residents of a 55+ active adult master planned community as co-creators of research?” I have used both participants’ responses to interview questions regarding co-creation of research and extensive observation of the process of involving participants in research. Participant opinions on co-creation of research ranged from general interest to conditional interest to little or no interest, with most participants indicating some degree of willingness contingent on certain conditions.

### **Opinions About Co-Creation of Research**

As Saunders (2012) points out, “choice of research participants is, invariably, constrained by what is practicable” (p. 35). This was certainly true of this study, with participants being largely self-selecting, with their agreement to be involved motivated in some cases by interest in the research itself but more often motivated by a desire to be helpful or to do a favor for a friend in the community. My original plan was to ask participants about co-creation of research during a follow-up interview focused primarily on participant validation. However, it was not always easy to get responses from participants or to set up interviews, and I determined that it made more sense to ask the most important questions while I had their attention.

Near the end of each in-depth interview, I asked participants about their thoughts on “helping researchers do research.” Because the interviews were conversational rather than formal, I did not use the exact wording each time I asked the question, nor did I always include it in the same place in the question sequence. However, I did try to include the question only at the point where I had nothing else to ask of participants by way of assistance, so I would not have to ask for their help after they had indicated a lack of interest in co-creation of research.

Anticipating the likelihood that few if any of the participants would have ever encountered or considered co-creation of research, I prefaced the co-creation questions by explaining what I meant to anyone likely to be unfamiliar with research. One participant, who had a doctoral degree in educational research methods and understood the concept perfectly, was a clear exception. Most of the other participants responded with surprise that such a concept existed. This allowed us to discuss it further, and for me to provide as much clarity as the participants required. Participant responses can be divided into three general groups: 1) General Interest, 2) Conditional Interest, and 3) Minimal Interest.

***General Interest: “I’d Just Like to Help”***

Several participants exhibited interest in involvement in research. These were typically people who also had the skill set and motivation to be effective co-creators of research. The original gatekeeper, Stanley, fits within this category; he is both well-connected in the community and is detail-oriented and methodical. Stanley also took a positive attitude toward the potential of co-creation of research, noting that it could be useful to the community, especially since it invites the voices and perspectives of residents. “I don’t think that the ability to communicate with the community in a meaningful way has ever happened here. It takes a different approach.” He recounted one example of a community decision that did not take appropriate consideration of member opinions, calling it “s a total disaster.”

Despite enthusiasm for the concept, Stan was realistic about the challenges of doing research Sequoia Heights. He immediately identified a central issue: “The tough question is, ‘How do you stimulate people that don’t want to be stimulated?’ I think that almost any idea needs to start off with a very commonsense description of why this could be a popular activity.” He provides the following perspective about approaching a community research project:

This project needs to go further than describing what the activity is, but *why* does the activity matter? And that's what comes from interviewing with other people that are doing it elsewhere, and I think that's important information to include in the framework of any kind of a survey or a study.

Some participants took a favorable attitude toward co-creation of research because they saw it as a potential social outlet. Dolores liked the idea of conducting interviews. "Just because you get to know people a little better and it might be just interesting to hear what people have to say." Dolores is a self-described "learner," noting that learning and being mentally active are very important. "I've often thought of going back into schools and volunteering."

Some participants saw co-creation as an immediate application of their skills, offering an opportunity to be useful to researchers. "I would be really good at budget planning" Michele said. She had been frustrated by her inability to be involved in similar ways in the community. "A few times I suggested I can be helpful, haven't met with much appreciation." She also felt motivated by the desire to be helpful. "If you feel they really need the help, that's what you would do. . . . I'd just like to help."

***Conditional Interest: "It Would Have to be Something That I Cared About"***

Some residents expressed interest in the concept of co-creation of research, but with conditions, often involving interest in the subject. Debra said, "I would be open to listening to the opportunities. It would just depend on the time involved, and maybe even my interest, but yeah. I love analysis, I love statistics. I'm in psychology. I love that type of thing." Carol reported being interested in research, having been a subject before in a study where she wore a tracking device to record movements. Her initial response to the idea of being a co-creator of research was that she would need to be interested in the research topic to be involved in a study.

It would have to be something that I cared about. For instance, I'm very passionate about emergency preparedness. I like being involved in research like when I worked at the

university, and I find it very interesting what people are studying and what they come up with.

Although Carol initially said she would not be interested in co-creation of research, when we met again for an activity, she had thought more about the idea. Her initial hesitancy came from her uncertainty that she could develop a topic on her own, along with fears about organizing a group to research it. She concluded that she would be interested in a project that was researcher-led. She also said she'd been initially reluctant to participate in my study. I asked why, and she said it was only because she didn't know me. The recommendation of a trusted friend and boredom during the COVID-19 pandemic broke through her resistance.

Ray pointed out that it is hard to agree to participate as a co-creator of research in the abstract, but he was not opposed to involvement, particularly if his work would be valuable or helpful to someone else. For instance, "If the topics were interesting to me, and if it was thought that I had something to offer, that I could help, then, yeah, that that could be fun." Ray also liked the feeling of accomplishment that may come with completing research.

The same sort of feeling I will feel when I can start putting bottles into the wine rack and it won't fall over, when that's all done, I will feel, I can look at that and say, 'That was painful in more ways than one, but I got it done and I like the way it looks and, okay, now the next project.' It's the sense of having done something that was worthwhile doing and wasn't just a piece of cake to get it done.

Kay answered similarly but focused on what she thought community members in general would feel rather than her own opinion. "I think, certainly, in a community like this, you would have people that would be interested in contributing to research . . . because I personally know of people where that's what they did in their professional lives here . . . because this is an educated community. But some might say, 'I'm done with that.'"

Paul expressed some interest in helping with research, while acknowledging that his skill set is within the hard sciences. He also pointed out the complexity of research.

There's all these levels and you can look at it in different, cutting and slicing, the big picture versus the little picture. And you need to not just have random things but a concept. So, you're trying to formulate that, but it's been a while since I worried about that kind of stuff. I would not assume that is something that's in our wheelhouse to do. Now give me a spreadsheet, I'm great.

***Minimal Interest: "I Want to Play"***

Many residents took the attitude that participating in this kind of "work" was not how they wanted to spend their retirement. Sharon said

Probably not at this point. You know I've done so much of that with school. We did quite a bit with teaching where we would go to other schools and evaluate and accreditation assessments. And write-ups and I just think I'm glad I'm done with that. To be honest, I was even thinking of what you're doing now, that you're preparing for your doctorate and doing this research. And I was thinking, 'I'm glad I'm not doing that.' I mean I'm happy for you.

Joan, who has a professional background in research, reported that she is not interested in structure at this stage of her life and consequently would have little interest in doing research.

"I want to play. I'm done with structure. My life has been so structured. I don't have a to-do list. I have a few things I want to make sure I don't forget to do eventually." Joan went on to say,

Richard Rohr talks about there being basically two stages in your life, the first part is your building stage, and you have these dreams and you're trying to achieve these dreams. And at some point, something happens, not to everybody, but ideally, that throws you into the second stage, and it's usually something that's challenged you in some way, like a divorce can do that. Just anything can do that. And then you start trying to reconcile this. 'Well, what is it I want out of this life?' And it's getting more in touch with loving the life you have rather than trying to work to have a life. I'm done working to have a life. I'm just done. I like the idea of not having a goal.

Lin voiced a similar feeling in discussing wanting to go back and volunteer in schools, an idea she later rejected. "I just felt I had so much responsibility for so long."

Others were similarly uninterested in research in general but willing to be involved. Peter said, "I would. I don't myself have an interest in researching. I can do it and have done it. But to help a researcher, someone like yourself, sure." Page said that while she had little interest in

research they wouldn't mind serving as a connector of people, as she had done for this study.

Otherwise, health problems and heavy caregiving responsibilities preclude involvement in much of anything else. "I'm not wanting to get involved in things just to get involved." Other participants expressed similar feelings with Karol noting that current priorities were focused on family and friends.

Regarding the community, Carol noted the difficulties in getting people in the community involved in anything.

We have struggled here . . . to get people to volunteer for committees or for the board. There's a group of older people that do want to be involved and do want to do things. There's another group that is less interested. We've run into this with trying to get people to join committees, and because my husband was on the board, he was kind of active in that. People would often say, 'No, I'm retired, I don't want to do anything. I don't want to be involved. I don't even want to read the e-newsletter, I don't want to know anything.

Pat made similar observations about the lack of engagement in community governance, which would provide insight into the general lack of interest in involvement in research, but she attributes the apathy to general contentment. She said

. . . people are happy with the community, they're happy with the monthly assessments, they're happy with the way things are going, and they don't need to pay attention to board meetings or committee meetings.

This attitude likely applies to involvement in research for many residents and is consistent with observations I made about the level of interest in co-creation expressed and demonstrated by participants in this study. However, most participants had never thought about co-creation of research, and some seemed open to discussing the idea further. It seems likely that many who demonstrate initially tepid or negative responses could modify those attitudes with longer-term engagement with a researcher, possibly in a social setting that offers engaging opportunities to discuss problems in the community and how co-creation of research could make a positive difference.



## **Doing Co-Creation of Research at Sequoia Heights**

There are clear benefits to the participation of older adults in a 55+ active adults master planned community as co-creators of research, and the study could not have been completed without their assistance. Sequoia Heights residents were instrumental to the study in the following ways: 1) Gatekeeping, 2) Survey item suggestions, 3) Survey review, and 4) Survey dissemination. However, several barriers became evident as the study progressed: 1) Preference for superficial involvement, 2) Preference for talk over other forms of engagement, and 3) Difficulty getting responses. Barriers are not necessarily reasons to avoid co-creation but may require certain types of approaches to increase success level. Both participant contributions and barriers are detailed in the following section. These benefits and barriers are discussed in detail with numerous examples provided to illustrate the various points that were made.

### **Participant Contributions**

#### ***Gatekeeping***

On the side of the main road leading into Sequoia Heights, there is a tasteful blue wooden sign that reads “No Soliciting.” The first challenge I faced was accessing participants without approaching them directly. Even if the neighborhood had not had this official policy (which was not always honored), cold calling strangers, especially older people who have become increasingly suspicious because of various phishing schemes directed disproportionately at them, would be unlikely to create an atmosphere of trust between residents of the community and me. Saunders (2012) points out that “access to organizational gatekeepers is usually brokered by friends and colleagues” (p. 36). I personally knew three Sequoia Heights residents when I began preliminary investigations into the feasibility of conducting a study at Sequoia Heights. I contacted the one who seemed best positioned to give advice. They first contacted the administrative offices about the no soliciting policy. An administration official said the policy

cannot really be enforced—for instance, no one would stop me from knocking on doors—but that individual residents might react badly. “They might pull a gun on her,” the administrator added. My contact introduced me to a resident who was well-connected in the community, debriefing me on the individual as follows

He knows the president of the board and others on the board, and he will talk with them. He is quite positive and thinks there is a way to do this and get around the anti-soliciting policy. He believes there will be a lot of interest in your findings and when you are finished there could be an open house/poster presentation that would draw quite a few residents. (Personal Communication, August 29, 2000)

The resident had lived in the community for more than 10 years and was involved in community governance, as well as various clubs and activities. I contacted him in late September of 2020 and explained my project. He was enthusiastic, particularly about utilizing the perspectives and skills of older adults in co-creating research. At his request, I wrote a brief synopsis of the research project, along with my own biography. He asked for a few minor edits before sending it to potential participants (October 2, 2020). By October 20, 2020, he had started a list of potential interview participants and was concerned about the complications that could arise from COVID-19 restrictions. I was not planning to begin interviewing until Spring of 2021, at the earliest, and did not begin interviews until June of 2021. I was fully vaccinated by then, as were all the participants. While I had a contingency plan—to interview via telephone or Zoom—fifteen out of the sixteen interviews were conducted in person. The sixteenth was conducted via Zoom. That participant later met with me in person for an activity and an informal conversation.

Meanwhile, the gatekeeper continued to make connections with people in the community.

In December 2021, he wrote

Just checking in to let you know that things are going well here. I have started making calls, but somewhat guardedly, mostly because if your schedule remains the same (late spring-early summer) I don't want to have volunteers forget about making the initial contact directly to you, as we discussed. I have 40 names on my initial list. I realize that

you only asked for 10-20, but I do expect some “no’s.” (Personal Communication, December 16, 2020)

On January 12, 2021, he sent what he refers to as “a transmittal and action letter” (Personal Communication, January 12, 2021). to the first group of individuals he contacted. The letter provided an overview of the project and detailed the process the gatekeeper wanted participants to follow, specifically that they should call or email me “to talk about when and how you want the interview to occur and when you are available to do it. It is your call.” He also noted that I “may ask you for a couple of more contacts to fill out some of the information she will have gotten from you.” The gatekeeper highlighted his selection process, saying, “I am selecting a diversity of people based upon what I know about them, and it is probable that there might be some gaps in the relationships between various interests.” (Personal Communication, January 12, 2021)

Despite ongoing health concerns, including at least one hospitalization, he continued to send similar updates periodically, wanting to know how many potential participants I had heard from and continuing to contact new people. Of the 40 individuals he approached, twenty-seven contacted me. Two declined to take part since they were preparing to move. One declined because they felt they had nothing of value to offer. Two were excluded because they no longer lived in the community. After receiving research materials (recruitment letter, consent form, demographic form, activity journal), three men responded immediately that their wives would not be participating. Six never responded after receiving materials. One responded to a reminder, saying they had forgotten to complete the journal. One provided a list of typical activities but did not complete the journal. Two cited multiple personal and health problems and opted out of the study. One gave travel as a reason for opting out. Not everyone responded promptly to the recruitment letter and other materials. In the end, eight participants from the original group

provided by the gatekeeper completed activity journals and nine participated in in-depth interviews (the additional person being the partner of a full participant).

Although this gatekeeper helped identify numerous individuals who were contacted and expressed interest, not all were responsive to research materials, such as activity journals. I decided to contact another gatekeeper. About three weeks before I arrived on site to begin interviews, I made a short visit to the community where one of my acquaintances at Sequoia Heights introduced me to another individual who could serve as a gatekeeper. This individual has lived in the community for several years and serves as an informal “block captain,” keeping in touch with neighbors. We met in person, briefly, on May 23, 2021, and she agreed to participate in the study herself and recruit others to join as well. By May 31, she had emailed several potential participants and copied me on these emails. I contacted these individuals with recruitment letters, activity journals, consent forms, and demographic forms. This was a much faster process, mostly because I could contact participants directly rather than waiting to hear from them. Twelve more participants were contacted and provided with recruitment letters, consent forms, and activity journals. One opted out because they did not want to complete the activity journals. Two opted out for no given reason, with apologies. One was excluded because they did not live in the community but was a frequent visitor. One started the activity journal but did not complete it. A total of seven participants joined the study from the second gatekeeper. The sixteenth and final participant was recruited by me. This individual was someone I previously knew and who I thought would be a good addition to the group since they work part-time, are single, have family in the area, and appeared to be involved in activities primarily outside the community.

It was interesting to note that the yield of participants from the two gatekeepers was nearly identical, even though one approach was methodical, carefully considered, and took place over several months while the other was rapid-fire, with the gatekeeper simply dashing off emails to anyone nearby to see what the result might be. The quality of interviews or overall engagement with the project did not appear to be affected by the manner in which participants were recruited.

**Table 4**

*Participant Yield from Two Different Gatekeepers*

Gatekeeper 1		Gatekeeper 2	
Potential Participants	40	Potential Participants	12
Initial Contact	27	Initial Contact	12
Attrition		Attrition	
Moving	2	Did not want to do journal	1
Nothing to offer	1	No reason given	2
Excluded	2	Excluded	1
Withdrew after receiving materials	3		
No response after receiving materials	6		
Forgot to complete journal	1		
Decided to provide different data	1		
Personal/health concerns	2		
Travel plans	1		
Final Yield	8	Final Yield	7

***Survey Item Suggestions***

Near the end of each in-depth interview, I explained that one goal of our work together was to develop a survey that could be provided to Sequoia Heights residents. I asked each

participant to provide questions they thought might be useful in learning more about how older adults in the community experience activity, and how the community contributes to being active. Some participants found the task relatively simple and made several suggestions. Others struggled with ideas but were open to prompts or suggestions. When all the interviews were completed, I compiled the suggestions into the list that appears in Table 5.

**Table 5**

*Participant Survey Question Suggestions*

---

Suggestions
How well informed are you about healthcare options?
Transportation
Do you like your neighbors? Why?
Do you like the location of Sequoia Heights?
Are you afraid to use the trails?
To what extent has Sequoia Heights lived up to your expectations?
Do you think Sequoia Heights is an active place?
Is Sequoia Heights good value for money?
To what extent do financial considerations impede your activity level?
To what extent does your local block integrate people or give people opportunities to mix?
How have your values changed in the last twenty years?
To what extent does Sequoia Heights fulfil your social needs?
What are you looking for in a community?
Why did you move here?
Have you achieved your goals in moving here?
How do the different age groups blend?
How did you get involved in the community at Sequoia Heights?
Have you made friends versus acquaintances?
Do you have suggestions for things that might create better social opportunities at Sequoia Heights?
How do friends at Sequoia Heights serve as sounding boards for decisions?
How helpful are the resources Sequoia Heights offers?
Is there enough going on to keep you busy at Sequoia Heights?
Are there clubs or activities that are missing at Sequoia Heights?
What is life for?

---

Table 5, continued

---

Suggestions
Whom do you serve?
What length of time is an activity?
What hobbies do you have?
How do animals facilitate social interaction?
What Sequoia Heights activities do you participate in most often?
Are you interested in leading activities or just being involved?
What other types of activities would you like to see, and would you be willing to pay extra money for them?
Why did you come to Sequoia Heights?
Is Sequoia Heights meeting your expectations?

---

I reviewed the suggestions and selected those that seemed most applicable to the topic under consideration. I rewrote some items so they might better conform to a Likert-style or open-ended item, rather than eliciting Yes/No responses. I also reviewed the list of activities participants included in their activity journals and separated these into categories. The listed activities were used to form categories of activity. Eight categories were originally sent to participants for their review and 10 categories were finally used as survey items intended to determine: 1) Which activities participants do most often and 2) Which activities participants most enjoy doing. Suggestions from participants, selected and edited by me, along with demographic items and additional items that appeared to address issues mentioned in interviews, were used to make up the remainder of the survey. Participants reviewed the final survey which was sent as a Microsoft Word document via email before it was finalized. After suggestions were incorporated, the survey was imported to an online version in Qualtrics for dissemination via an email link. The final survey items appear in Table 2.

### *Survey Review*

Eight participants responded with comments on the survey. Most gave brief responses, such as, “looks fine.” Other responses gave slightly more detail, such as, “Categories seem appropriate. I noticed that some items in Special Outing might better fit in Practical/Routine, but I guess it could be a context issue.” One participant completed the survey rather than providing feedback. Another responded that they were unaware of the scope of the project and only knew that they would keep an activity journal and be interviewed. Three participants gave more detailed feedback that caused me to make changes to the survey. An example is as follows, as comes as the result of an email dialogue between the participant and me:

I think you have come upon a good approach. A couple of thoughts: The term ‘Passive Activities’ poses, first, something of a linguistic, internal conflict. How can an activity be passive? But looking past that, I think Inactive Activities would be worse. Would Passive Times be any better together with your list of examples. Or as you suggest, just a stand-alone ‘Passive’. And I like the idea of an Entertainment category to include activities such as movies, plays, TV, etc. Re Employment/Volunteer Work, I can think of reasons to make them separate or the together. It seems to me that the test of which is best of those two approaches in predicting which will get you the most complete responses. You make a good point about different motivations and satisfactions, and I would add time demands and obligations. I was thinking some more today about my earlier response resources of satisfaction. Thinking about that issue leads to asking questions at a different level. Let me see if I can sort out my thinking and explain. If we take the wording of your proposed statement: ‘Sequoia Heights fulfills my social needs’ we can explore what that means. Does living in this place with this group of people allow me sufficient opportunities to get the satisfaction that comes from helping my neighbors succeed, from collaborating with them on special projects, from sharing in their interests, exercising leadership, and expanding my knowledge through better understanding their talents etc. What I am trying to think about here, somewhat ineptly, is to contrast that with leading people down a path of checking boxes about how many committee meetings I attended, how many cocktail hours I participated in, how many bridge games I played etc., and bring the focus to deeper sources of joy in life than just keeping busy. I would never argue that your approach should go in that direction. Way beyond my pay grade. But did want to take advantage of your further inquiry to pass along that I have been thinking further of the subject.

These kinds of conversations were collaborative and useful to me. I think the participant, who had initially expressed little interest in co-creation of research, also enjoyed the opportunity



to think through some of these issues and provide valuable suggestions that resulted in a better survey. I would have appreciated receiving such detailed and thoughtful feedback about the survey from a greater number of participants.

### ***Survey Dissemination***

All interview participants, plus the additional member of the community who introduced me to the two gatekeepers, were provided with Qualtrics links to the final survey and asked to take the survey themselves and to forward the link to any friends or neighbors who might be willing to complete it. I hoped each co-creator would send the survey to at least five others. This, along with survey completion by each co-creator, would have resulted in 96 responses. As it turned out, fewer were received—a total of 57. The survey became available on September 29, 2021, and closed on November 1, 2021, for a total of 34 days. I sent weekly reminders by email before the survey closed. About half the participants responded to confirm they had either filled out the survey themselves or had filled it out and forwarded it to others. The other half did not respond at all, and I do not know whether they took the survey or passed it on to anyone else.

Page took the initiative to put an announcement on an online forum to get more participants. She also contacted management of the community to ask for their cooperation, but while the management representative was positive about the project, they did not provide official avenues for dissemination. This is likely because a survey regarding possible expenditures on community amenities had recently been administered to all residents and there were concerns about survey fatigue. One emailed that they had not found Sequoia Heights to be a good fit and had recently moved to another community. They did not want to be further involved. I thanked the individual and did not send additional reminders.

### *Ideal Co-Creator of Research*

As an attorney, Dave has a useful skill set that would make him an asset to a researcher—detail oriented and attuned to the variations in meaning that come from slight adjustments to wording—he has little interest in being involved as a co-creator of research. He would need to have an intrinsic interest in the topic itself. “Also, I’d have to really understand it and think I could make a contribution to improve it somehow or make it better.” His involvement in the yacht club is an example.

I’ve been a member there for over 40 years and I really know the place, and so it’s interesting for me to go in and dive into the governance questions. Whereas if I was just doing something I didn’t really have a deep understanding of, I don’t think I would be very interested.

Despite the reported lack of interest in co-creation of research, Dave was, from the beginning, a thoughtful and engaged helper. He admitted that his primary motivation for agreeing to participate in the study was as a favor to one of his friends, who served as a gatekeeper and who arranged access to more than half the interview participants in this study. Still, he took his participation seriously. He emailed me early on to clarify the meaning of an activity that takes place at Sequoia Heights. He noted that he often does work phone calls, for instance, from his home but that these have nothing to with Sequoia Heights per se. This led me to revise the wording on the activity journal slightly to clarify that using Sequoia Heights facilities or taking part in an activity where being on site is integral to the activity is the crucial question.

After our interview, Dave gave the matter of survey questions more thought and emailed me with an additional question for the survey. Once I had created a draft survey and elicited feedback from participants, I got a very thoughtful response from Dave. He went so far as to make notes on the survey, scan the pages, and email them back to me. His edits resulted in better

wording for many of the survey items. In addition to spending 1 hour and 45 minutes with me on a tour through the forest, his annual tradition of walking all the trails in the community in one day (he has a name for the tradition and a short video) encouraged me to complete the challenge myself. I hiked about half of the trails with my father and the rest on my own on Saturday, July 3. Dave also told me a story about a type of bamboo that grows to be 90 feet tall in a matter of weeks. But first, you first must water and fertilize it for four years without any sign that anything is happening. This is a lesson in patience and faithfulness, which seems well-suited to many aspects of life, including both research and the aging process.

### **Barriers to Co-Creation**

Since this section gives details about participant involvement in the study that could be seen as critical or negative, I have not attributed words or actions to specific participants but have kept these anonymous. My overall impression is that participants wanted to be helpful but did not want extensive involvement in the research, felt their most valuable contribution would be providing interview responses, and were busy enough with their own lives that responding to research requests was not a high priority. This does not necessarily mean that co-creation cannot be effective with similar groups of people, only that researchers need to be aware of the impact these preferences have for research and adjust procedures and expectations accordingly.

### ***Minimal Involvement***

It was evident that participants generally preferred minimal rather than sustained involvement in co-creation of research. Several withdrew their agreement to participate because they had not read materials well or had forgotten the extent of the work I wanted them to do. In some cases, participants preferred to be involved entirely on their own terms, with minimal attention to instructions. For example, one potential participant decided they were unable to fill out the activity journal or participate in an interview, so they sent me an email list of general

types of activities they liked to do. One participant immediately informed me that they could not spare 90 minutes for an interview, and I would have to ask my questions in 30 minutes. Another had been confused about the time we had agreed and needed to cut our interview short to attend an appointment. Few suggested activities for us to do together, although most were agreeable to suggestions I made, perhaps out of politeness and wanting to see what I might like to do. Of course, because of the way this study came about (as my dissertation), participants had no opportunity to suggest a topic or to have input into methodological decisions. The study was very much researcher-led and they understood that I was directing the project. I am certain that they avoided making recommendations and suggestions out of deference to me as “the researcher.” Even so, most seemed motivated by nothing more than a desire to be helpful without getting involved in a project that would take too much time or effort.

### ***Emphasis on Talk***

Several participants elected not to participate in the study as soon as they knew they would be required to do more than participate in an interview. One wrote in an email, after receiving research materials including the consent form and activity journal, “Sorry, but I really don’t want to fill out a journal.” Others were less straightforward in their responses but indicated in more subtle ways that their involvement would primarily consist of the interview. Most were happy to participate in an activity with me, especially if I suggested an idea. Most also made efforts to suggest survey questions that could be used to gain a better sense of how the community relates to the concept of activity, however they tended to have little interest in helping to create the survey or be heavily involved in the research in other ways. Only three participants gave suggestions for amendments to the proposed survey and about half never responded to follow-up inquiries.

### *Unresponsiveness*

While high levels of interest and willingness to be involved were reported by both gatekeepers, it often proved difficult to translate the initial positive response into sustained participation. This may have been due to a loss of momentum between initial contact made by the Gatekeeper 1 and my contact with participants which could only occur once Institutional Review Board (IRB) approval was gained from the university. In any case, many participants who had indicated willingness did not respond to further communications. In many cases, the reason was not known. However, some participants contacted me weeks later to apologize; they had been traveling or had forgotten or had experienced health difficulties. Recruitment of others to complete the survey may also have suffered from the length of time between interviews and the start of the survey. Interviews were not completed until the middle of August. At that time, I compiled a list of activities and began to create a draft of the survey which participants received for feedback in September. The Qualtrics version of the survey became available on October 1, and responses were slow. It is possible that some participants felt uncomfortable forwarding the link to friends and neighbors, as if they might be seen as “selling” something. The survey was also long, with many items, and it is possible that survey fatigue resulted in fewer responses.

### **Methodological Co-Creation Conclusion**

This study suggests that co-creation of research has potential for beneficial partnerships between researchers and older adults living in a 55+ active adult master planned community under certain circumstances. First, participants must be carefully recruited for both interest in the research process and an applicable skill set or willingness to learn. Skills do not need to consist of formal academic training but would ideally involve an ability and willingness to conduct interviews, read transcripts, make suggestions, recruit participants, read and compose drafts, present materials, and analyze data. The initial development of the project would need to set

clear expectations and establish the relationship between the official “researcher” and co-creators, so older adults acting in this role feel ownership of the research project from the very beginning. This would mean getting involvement at the early stages of the research project—establishing the research topic and modes of investigation in collaboration to assign roles and establish full engagement from the beginning. This would allow participants the opportunity to choose modes of inquiry they are comfortable with using. Ownership of the project would also give co-creators greater motivation to ensure that the research is successful. Part of creating ownership might involve educating potential participants on the benefits of participatory research—providing examples of studies that have made a difference in similar communities—to dispel the inertia that can exist when people feel, as some expressed, that “research does not result in real change” (Personal Communication, June 22, 2021). Development of a well-functioning research co-creation community would likely require long-term engagement and sustained involvement on the part of the official “researcher” and the older adults serving as co-creators.

### **Meaning of Activity for Older Adults in a 55+ Active Adult Master Planned Community**

The second research question was, “What is the meaning of activity for older adults in a 55+ master planned community?” Activity is heavily emphasized in the promotional materials advertising Sequoia Heights and in the overall concept of similar communities. The community promotes itself as follows

With more than 40,000 square feet between our two clubhouses, there is a plethora of activities and amenities for homeowners, including a state-of-the-art fitness center, indoor pool, and a bistro for coffee, drinks, and light meals. Our Center for Well Being provides a variety of fitness classes with personal training and spa services. (Website, accessed May 28, 2022)

The promotional language continues for several more paragraphs, and" uses phrases such as "clubs that serve all kinds of interests," promising that residents are "sure to find a club of similar-minded folks!" An "Active and Events department" has been created to help residents "socialize and have fun" with other residents, and amenities advertised include "world-class tennis and pickleball courts, a community part for residents to picnic with family and friends" while playing lawn games such as bocce and croquet.

It seems likely that an "active" community is a high priority for residents who have chosen to live in a 55+ active adult master planned community. The community presents a superficial allegiance to this idea. The Center for Wellness contains extensive gym equipment, a swimming pool, yoga studio, and indoor track. Outside, there are 15 miles of forested trails, tennis, racquetball, and bocce ball courts, and playground equipment for visiting grandchildren. The indoor facility has pool tables and a café, along with several rooms of different sides that are used for concerts, lectures, games, and other activities. Residents can book the facilities for private parties and events. More than 70 clubs are represented, all facilitated by residents. Activities are advertised through online newsletters, social media, and the community website. Some activities are free; others require an additional fee for tickets. Many activities are restricted to residents only.

The meaning of activity for residents was addressed through 1) Range of activities, 2) Rationale for activity journal inclusion 3) Definition of "activity" and an "active person" provided through interviews and survey responses, 4) Importance of being active and being perceived as being active 5) Views on retirement and aging, 6) Choice of community, 7) Community contribution to activity, 8) Effect of the COVID-19 pandemic on activity, and 9)

Other barriers to activity. Together, these topics form a picture of the meaning of activity for older adults in a 55+ master planned active adult community.

### **Range of Activities**

Sixteen participants recorded their activities for fourteen days, with the option to indicate the level to which an activity was enjoyed or to include additional notes. It was evident from the beginning of the study that the precise definition of “activity” was elusive to most participants. Some were concerned when beginning the activity journals, wondering, “What do you mean by activity?” I always turned the question around: “What do *you* mean by activity? If you think of something you do as an ‘activity,’ put it in your journal.” When we spoke during interviews, I asked participants to explain why they had chosen to include something they did in their activity journal, or, conversely, why they chose *not* to include it. “I didn’t think you’d be interested in that,” was a common response. Some insisted that they didn’t “do” anything. A conversation I had with one participant went like this:

“I don’t do anything.”  
 “Nothing?”  
 “I take care of my grandson. That’s it.”  
 “What about this puzzle you have set up?”  
 “Oh, well, yes, I do work on puzzles. I also read.”  
 “What about this yoga video? Do you use that?”  
 “Yes, I do chair yoga every day.”  
 “But that’s not in your journal?”  
 “I didn’t think you’d be interested in that.”

Despite a general ambiguity around the concept of activity, participants did record an impressive array of activities. These were later separated into ten categories approved by the participants. These are shown in Table 6.



**Table 6***Examples of Activities Reported in Activity Journals by Category*

Category	Examples
Physical	Walking, gardening, yoga, golf, pickleball, lifting weights, foot stretches, chair yoga, online exercise classes, cycling, stationary bike, walk stairs, hiking, tennis, volleyball, water volleyball, chair exercise, walking dog
Social	Time with family, eating out, visiting with friends, correspondence, phone calls to friends or family, potluck dinners, club gatherings, cocktails, attend sporting events, cribbage, Zoom social, tennis social, poker, book club, Mahjong, hosting events
Intellectual	Puzzles, knitting, reading, watching lectures, Zoom presentations, internet research, crossword puzzles, working on life history, organizing coin collection, Storyworth, photography, reflection, flower arranging class, opera, meditation, bird watching, online courses, library visit, Sudoku
Practical	Pick up prescriptions, donate items to charity, hem pants, meal preparation, medical appointments, collecting mail, pay bills, laundry, resolving email issues, packing for trip, replacement keys, replace smoke/carbon monoxide alarms, wash deck, pest control, buying stamps, shredding documents, dry cleaning, assembling furniture, clean pool, sort mail, puppy training
Employment	Full-time work, part-time work, conference calls (work), work emails
Volunteer	Babysitting, meetings, sports practice (grandchild), Zoom meetings, feed kittens, helping friend with practical issues, lunch with newcomer, teaching grandchild, attend sports game (grandchild), attend school event (grandchild), filling divots on golf course, caring for mother-in-law
Personal Improvement	Flute practice, cooking lesson, spa day, haircut, church, pedicure, massage, acupuncture, manicure
Passive	Scenic driving, sitting, napping, relaxing
Entertainment	Watch television, see a movie, social media, play computer games, play video games
Special Events	Japanese garden, assisted living open house, birthday celebration, boat visit, visit out-of-town friends, memorial service, celebration of life, Shakespeare (Zoom), garden shopping, party, studio art sale, outdoor movie/park, vacation property visit, wine tasting, Costco shopping, beer-making supplies, making beer, making root beer, garden tour, charity auction

### **Criteria for Activity Journal Inclusion**

During interviews, I asked participants how they had decided what to include in their activity journals. Many reported that they just included “whatever I did.” Others acknowledged that their reported activities were edited and did not include routine or mundane activities, such as taking a shower or brushing their teeth. Some claimed to record only physically active things they did, in one case because the participant thought that I was physically active and would therefore only care about physical activities. When I clarified that this did not need to be the case, this participant talked about painting, part-time employment, and shopping with adult daughters. Others thought in terms of chunks of time and did not include anything that was accomplished too quickly. “It has to have integrity in itself,” Dave said. Many were not entirely sure why they had included certain activities and not others but admitted to favoring a combination of activities that were both special, like having a meal with a friend, and routine, like taking a daily walk, or that formed a significant picture of how they spent time, such as attending work meetings or babysitting a grandchild. There were invariable contradictions. Some people claimed to include nothing “routine” while noting daily walks to the mailbox.

Few participants consistently recorded their feelings about their activities as prompted—whether they enjoyed the activity, did not enjoy it, or found it a neutral experience. Dave, who did faithfully record feelings about activities also expressed appreciation for the question. “I really like that you asked how we feel about what we do, the extent to which we derive pleasure.” Others thought it should be fairly evident whether an activity was enjoyable or not, although one who did provide enjoyment rankings quite faithfully varied in enjoyment of caregiving responsibilities, as anyone who has cared for small children can appreciate.

Asking participants to record daily activities for 14 days before discussing the concept of activity allowed them space to consider how they think about being active. Likewise, asking how they had gone about filling out their activity journals appeared to help some participants develop more clearly defined ideas of what they consider an activity to be.

**Figure 1**

*Example of Journal Entry*

DAY THREE		Date: 5/31/2021		
ACTIVITY	AT TRILOGY	AMOUNT ENJOYED		
1. walked outside	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
2. Shopping	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
3. called Sister in Olympia	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
4. fixed dinner	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input checked="" type="checkbox"/> 2	<input type="checkbox"/> 1
5. watched TV	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
6. read	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
7. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
8. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
9. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
10. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
11. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
12. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
13. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
14. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
15. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
16. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
17. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
18. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
19. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
20. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1

3 = Enjoyed; 2 = Neutral; 1 = Did not enjoy

**NOTES (OPTIONAL)**

Prior to the pandemic I went to the Center for Wellbeing five mornings a week to workout in the gym or swim laps. I attended monthly meetings of our Trilogi Children's Hospital Guild. I visited the Club House library weekly and my husband and I enjoyed Monday Night dinners at the Club House Bistro as well as Food + Wine Club dinners. I also attended University of Washington OSHER courses and lectures at the Club House. I also periodically conducted Map Your Neighborhood emergency preparedness training at the Club House. All of that stopped with the pandemic. I do avail myself of ZOOM meetings and lectures as well as the Bistro Take-Out dinners.

## Definition of "Activity" and the "Active Person"

The definitions of "activity" and "active person" were elicited through the interview question, "What is an 'activity?'" and the survey items, "What does it mean to be an active person?" Answers to the interview question were grouped thematically and presented in narrative form below. Survey responses, which were shorter, were also analyzed thematically and are presented in a table with a definition of the theme and examples of responses that illuminate the theme.

### *Defining “Activity”*

In interviews, I asked participants how they would define “activity.” Most were initially vague in their definitions of “activity.” This was at least partly because few of them had given the idea much consideration. I reminded them of how 55+ active adult master planned communities such as Sequoia Heights are presented to potential residents, with a heavy focus on an idealized “active” lifestyle. One responded by saying, “In the pictures it shows people playing pickleball and doing outside parties. But until now I’ve never thought about it. I mean I can see people that are not active.” After thinking about the concept, participants offered a wide range of definitions of activity, that showed their thinking went beyond activity as merely what a person does. Some thought in terms of doing special things while others looked at significant expenditures of time. Many advanced an idea of activity as being varied while others emphasized certain types of activity, such as physical or intellectual. Some thought of activity in terms of freedom—having choices and the ability to be independent. Many expressed the idea that there are different ways to be active and that engagement with life is an important value for them. from a focus on physical activity to “being involved” or doing things that are special or particularly enjoyable. The following sections include definitions of activity given by participants in interviews and that largely comprise the following themes:

**Activity is Special.** Several participants saw activity as something enjoyable and out of the ordinary. Page said,

To me, going to get a pedicure, which I did for the first time in more than a year, is an activity. And then I got a massage up at the clinic, and I have another one coming up, not this week, but the next week. Things like that that I really enjoy.

Similarly, Dolores reported that she does not think of routine, everyday tasks as “activities.”

It’s not something I do on most days like get dressed or take a shower. But if I left my house or if I read, I count that. I watch TV shows in the evening sometimes, and I would count that as activity, but not ordinary mundane chores like washing.

Stanley explained specialness as out of the regular routine. “Going out to dinner, for instance, as opposed to having dinner at home because that’s going to happen regardless.” Ray echoed this idea, noting that, “Getting together with friends . . . conversation, anything that causes you to use your mind, or your muscles. Routine things like brushing your teeth, I would say they’re active, but they don’t necessarily count. It’s just something you have to do anyway.”

Karol said

If I’m just here, I don’t know, paying bills or hanging out or whatever, I don’t count than as an activity. It has to be something where I’m leaving the house either utilizing the trails at Sequoia Heights or meeting up with a neighbor, or something semi-social.

**Activity Uses Significant Time.** Some participants thought of activity primarily in terms of time. For example, Dave spent his career keeping track of time in 60-minute blocks, and still thinks in those terms. He counts an “activity” as something that takes a significant chunk of time, enough to justify noting it. “It has some integrity within itself.” Joan thought of an activity as something that “took more than a few minutes to do.” She continued on to say, “It’s substantial. It’s not something you do in two seconds, like brushing your teeth.” Ray said it is “something physical that lasts a few minutes at least, and/or it’s something mental that lasts several minutes, ten, fifteen. It’s sustained physical or mental activity.”

Stanley gave a carefully constructed explanation of how using significant time factors into their definition of activity.

I see an activity as significant to the schedule itself and what I’m actually doing. An activity is a significant thing that you do during the day—sitting down and reading an email is not a significant thing, a block of time that you spend reading or on the computer with your email is significant. Or even, for example, typically in the evening, we’ll turn on the news around 5 o’clock, and we’ll go through a couple of hours of the news, and then we’ll watch a little *Jeopardy* and one or two programs. That’s an activity. It’s not a five-minute thing. And I think it’s going to be different with every person, because it kind of has to be significant to your thoughts, something that you remember that you either want to do or have to do.

Ray gave a lot of thought to how activity might be defined, concluding that sustained use of time and the importance of the activity were key.

I thought, ‘Getting out of the bed is an activity.’ There’s physical movement involved in waking up, but I thought, ‘Well, what’s significant enough that counts as an activity?’ So I said, ‘Well, when I get up, I go through those exercises.’ It winds up to be anywhere from 10 to 20 minutes. And I said, ‘Okay. What after that?’ Well, after that I have my coffee and read the paper. Having a cup of coffee, that’s an activity, but so what? It’s important to me, but I don’t know if it’s an important thing. And I said, ‘What do I do?’ Then I read the paper, then I do whatever needs to be done. And if there’s anything in the morning, usually there’s not that much, we just maybe go to the grocery store, maybe I have to go to Home Depot, things like that, run an errand. I fix lunch and eat my lunch, and while I eat my lunch, I do the *New York Times* crossword puzzle.

**Activity is Varied.** Many participants thought of activity as consisting of different dimensions, with Michele summing up this perspective as, “‘Well, obviously exercise. Also, I really need artistic stimulation. And I need challenges.’” Carol expanded on this idea in describing activity as both physical and mental.

I think it’s both. I have to have the mental stimulation, absolutely have to have that. I have to be physically active, and I have to be mentally active. I have to learn, and I need to interact with people, and this has been the tough part of the pandemic. I like the social dimension. When you go to a lecture, it’s fun to discuss it with the person sitting next to you. That opportunity was afforded to us here at the Cascade Club when we could do that.

Debra expanded further on this idea, saying

I would think active would mean something, probably physical, but I think it can be mentally active as well. I think active can be mentally active, sitting on the patio, reading a good book, whether it’s more academic, or just a good mystery, or more enjoyable, or funny, non-fiction or fiction. But also, I think, physical activity, it’s something that I find very important, but I think mental and physical. I think you have to find a really good balance. And social activity is very, very important. The friends I have, I think we have pretty strong friendships. We’re comfortable where we can confide in each other. Often, before COVID we would have a couple come over and just hang with us and sit on the patio and just hang out and talk. I think social is very, very important, but I think you do have to have a balance of physical, mental, helping people, and just being social. You have to kind of hit all of those just to keep yourself as much as possible in a good place.

Sharon initially interpreted activity to be something physical but broadened that definition as when we talked about it. It was interesting to note how my identify as the researcher affected her interpretation of the question.

I assumed that meant physical. . . . I don't know why I zeroed in on the physical. Maybe because you're so physical. . . . I guess it can be anything you're doing. I've started doing some oil painting. I guess activity could be movement, any type of movement, or brain stimulation. . . . I suppose my part-time job would be an activity.

Peter thought it was important to look at activity is in terms of having options regarding how to spend time. He said,

You can play horseshoes or bocce ball or play golf or tennis or pickleball, or swim, or lift weights, or bicycle, or walk or... Gosh, there's so many options, and there's so many clubs, bird watching and bridge, and one thing and another. So active means having options and then deciding which one to pick.

The combination of types of activities as important is summarized by Ray who says, "You need to keep your mind active, but you need to keep your body active too, because otherwise you wind up not being able to do anything."

Collectively then, activity is special, uses significant time, and is varied. This aligns with the kinds of things most participants included in their activity journals. They tended to focus on the routine matters they did each day, so long as these were substantial or memorable. They were less likely to include things they did that appeared trivial or that were quickly accomplished.

Table 7 summarizes the summary of activity definitions.

**Table 7***Summary of Activity Defined*

---

Activity Definitions
Activity Is Special
Activity Uses Significant Time
Activity Is Varied

---

***Definition of an “Active Person”***

Survey participants were invited to provide a response to several open-ended items regarding activity. The first was, “What does it mean to be an “active” person (in your own words)?” Responses were analyzed for thematic similarity and appear as follows in Table 8.



**Table 8***Themes in Defining an “Active Person”*

Theme	Definition	Examples
Being Engaged	Meaningful involvement with interests and/or the community.	“Engaged physically or mentally in meaningful interests inside or outside the home.”
Doing a Variety of Activities	Involvement in a wide range of pastimes.	“Engaged in activities; clubs, non-club groups, inter-personal games such as dominoes, or cards.
Doing Physical Activities	Indoor or outdoor exercise and sports.	“Daily exercise and activities.” “Capable of walking hills.”
Doing Social Activities	Interaction with friends or family.	“Having friends to do ‘things’ with. And the ability to choose what to do each day.” “Outside yourself.”
Being Independent	Able to manage one’s own schedule and do activities unassisted.	“Fully independent, no physical limitations.” “Able to do whatever you want.”
Being Facility-Centered	Focused on activities that are offered by the 55+ active adult master planned community	“Keeping moving and participating in the multiple activities available in Sequoia Heights.”
Getting Out	Activities that take place away from home.	“Usually have something to do outside the house.”
Being Busy	Having plans and plenty of things to do.	“Staying busy!”

### **Importance of Being Active and Being Perceived as Active**

Two Likert-style items were offered related to the importance of activity. These were, “To what extent is it important for you to be an “active” person?” and “To what extent is it important for you to be perceived as an “active” person?” While these were Likert-style items,

they also invited participants to explain why they'd selected the option they had. Regarding how important participants thought it was to be an "active" person, participants indicated that this was very important, with a mean Likert-style score of 4.71 out of a possible 5 ( $n = 56$ ). The mean Likert-style response to the item about the importance of being *perceived* to be active was much lower, with a mean Likert-style response of 3.01, indicating a certain indifference ("I have no strong feelings").

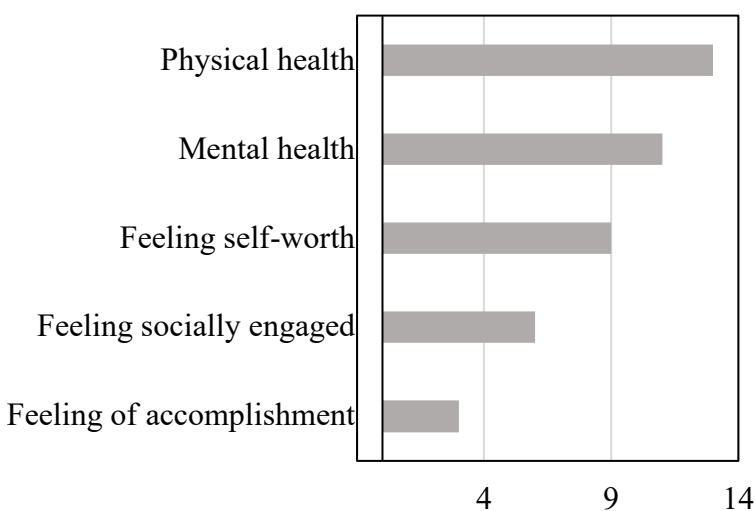
In explaining their responses to the importance of being an "active" person, participants most frequently mentioned 1) Health and longevity ("Being active will keep me healthy and help me live longer," "Either active or dead," "Staying active allows you to live a longer and more fun life"). They also indicated the importance of 2) Identity ("It's my self-image," "It's who I am," "It's who I have always been"), 3) Independence ("Being self-sufficient is the way I have lived my life," "Freedom to do what I want," and 4) Need to be busy ("I'm happiest when I have 'something' to do OR something planned," "I can't sit and do nothing for very long." Others acknowledged activity was important, but also valued quiet time. "I like time to myself and do not like being busy all of the time," "I don't always need to be doing something.")

Most participants reported that others' perceptions of them were relatively unimportant. Representative comments included remarks like: "Being active is a personal choice and I see no need for others to perceive it one way or the other," "I am more concerned with my own perception of my active status than that of others," "I do not care what other people think for the most part," "I don't know that others even care if I'm active". A few did indicate that the perception of being active was important to them. They wrote comments like, "Don't want to be perceived as old," "It encourages others to be active," "Easier to interact with people who are interesting and active."

Survey participants were given 5 potential positive benefits that could be derived from being active and were asked to select all that applied to them. Physical health was the one selected most frequently, followed by mental health. Figure 2 shows the frequencies for the positive effects of being active for those surveyed.

**Figure 2**

*Positive Effects of Being Active*



### **Views of Retirement and Aging**

Most of those interviewed said they had given little thought to retirement at earlier stages of life. “Nope, no concept,” Joan said. Dolores said, “I did not spend a lot of time guessing because I had lost my husband so abruptly that it was really hard to think that that couldn’t happen to anybody else.” Dave had devoted considerable time and energy to work up until retirement and did not consider retirement until the time seemed right to quit work.

I had always worked, starting with when I was 11 with paper routes, and yard work, and I was just convinced that there had to be some other life outside of work, and so just before my 63rd birthday, I said, ‘Well, enough. Let’s go see what we can find.’ I always thought I’d work longer, but I just had to change my mind about that.

For those who did consider retirement and aging before making the transition, parents or other older relatives were frequent models for those who had thought about how they might experience these stages of life themselves. Carol said,

My father worked until he was 80, so that was one role model that I had. He did not have hobbies. He worked, and that's what he did. He worked very, very hard. He had his own business. . . . He was so very physically active, and I think about that, the fact that he was so physically active, that probably helped his overall health.

Joan, who had not thought explicitly about retirement or aging, thinks her parents played a role in her underlying assumptions.

Both my parents are very active. My father didn't quit riding his motorcycle till he was 80 and gave it up because he felt like his distance vision wasn't too good. But he hiked and fished and hunted. My mother skied. I have the model of being a physically active family. I saw that with my father. He would also walk five miles that day, he'd sit down and have coffee, and then he'd go do something constructive. He built a house. He built my bedroom set. He was always doing something. He made wine. He made sausages. He just kept taking up one hobby after another. This was my exposure, so I assumed that would be just what my life was like, and maybe I just didn't think about it explicitly.

Page reports a father who had a very negative attitude about retirement. He said, "Do not retire until you have to." She seems to have taken that advice, continuing to work until the age of 82. "I love it," she said. "I just love it." The only reason she decided to stop working was her deteriorating eyesight and difficulty making the drive to work difficult.

Many had mixed feelings about retirement but were happy to have made the transition, once they became accustomed to the idea. Sharon said,

I loved it, but I don't miss having the responsibility of being there five days a week. . . . I had a chance to do some sub-teaching when I first came up here with our school. . . . But that was just a little overwhelming to start at a new state, a new school, a new community, so I didn't pursue it.

Michele initially struggled with finding meaning after retirement, and initially went back to work before retiring again permanently. She said,

I didn't have any goals. I mean, I had general, "Oh yeah, I want to do this." But I didn't have a timeframe to do it in. And I was very focused that way to achievement. Having goals and achievement, and I found that difficult when I retired. I'm kind of introverted, and so I like to spend time with my friends, but I can only spend so many hours a day, and then I need some quiet time.

Karol retired early, at the age of 49. She had little time to enjoy it initially because she received a diagnosis of breast cancer three months later. She said,

I did radiation, I had a lumpectomy. It took about four or five months to get through all that. Since then, I've thought that if this had happened while I was still working, I would have been so stressed . . . whereas instead I drove to Seattle every day and had radiation and would meet my girlfriends for lunch . . . . It did make me just really appreciate being retired . . . . I miss [some aspects of work] but then retirement has given me so much more time with my kids and my girlfriends that it's been good.

Stanley and Kay did spend a lot of time thinking about how they wanted their retirement to be. This came about because of dealing with their own aging parents. "We are both only children. We were the ones that had to deal with our parents." That experience, along with investigating and staying at 55+ active adult master planned communities, helped them determine the kind of retirement they wanted to have. Stan says, "We were really taken with the concept."

Not everyone at Sequoia Heights is retired. Debra, who is still working, expresses mixed feelings about retirement.

I think it would be a lot more enjoyable here with all the amenities that we do have, having more time for those, I think that would be really lovely. I'm relatively social, and I love to learn new things, I love getting into new things and I like that, and so I would definitely get involved. I need that. I can't just be retired and sit around. I have to be into something. And I think I'll probably always have to have some little niche or hobby. . . . I can't see myself, even though I love, love, love like sitting out here reading a book, but I can't see myself just sitting and reading day after day or just sitting. . . . I've . . . thought about going back to school and get a counseling degree.

Peter, also still working at the age of 69, was the only one to express a philosophical opposition to retirement. He said,

To me, it detracts from the value of our society here in the U.S. to retire. You have someone, let's say who's 65 years old, who's at the height of their corporate memory, who now takes it all away from the society at large. And to me, that's a disservice. You can only play so much golf, so much pickleball, play so much bridge, go for so many walks, and it becomes tedious. So, I work for as long as God gives me strength to work, because I think it's the right thing to do. There's a lot I know now, not because I'm such a bright guy, but because I've experienced so very, very much and to withhold that from our society, I think is a disservice. So, I have a lot to give . . . and I'll continue to do that.

### **Choice of Community**

This sample of older adults tends to be more affluent than the average, with a typical house in the community selling for well over a million dollars. Consequently, the individuals have many choices regarding where to live. Why do they choose a 55+ active adult master planned community? Interview responses indicated that the most important reasons for choosing the community were 1) Downsizing/Type of Home, 2) Age-Restricted Community, 3) Proximity to Family, and 4) Amenities. The three options ranked most frequently as being in the top three reasons for choosing the community selected by survey participants were 1) Type of Home, 2) Range of Activities, and 3) Proximity to Family. (All community characteristics are shown in Table 9). This section also includes the voices of some dissatisfied with the community.

#### ***Downsizing/Type of Home***

Many participants wanted a smaller home or one that could accommodate their needs as they aged. As Dolores noted, "I don't really want this big house anymore, and it's a good time to move." Karol made a similar comment, saying

[Our previous home] was a big property, big house. And we just knew when we wanted to retire, that we wanted to go to a place that had less maintenance, less house. We also have a place on Lopez Island that we wanted to spend more time at, so we just wanted a place where we'd kind of lock the door, not worry about yard and all that stuff.

Not only a smaller house, but one with certain features, such as a single-floor layout were important to some interview participants, many of whom were either having difficulty negotiating stairs or anticipated difficulty in the future. Carol said

My doctor had advised me to get a one-level house. I had bad knees and we were living in a tri-level, and I had to go down a flight of stairs for the laundry. He said, ‘Get a one-level.’ So we did look a little bit, kind of half-heartedly and there weren’t very many one-levels. . . . When we came back up here two years later, almost all of them were one level. We decided very quickly to move here.

For Sharon, the combination of a smaller, easier house to maintain, and the lack of stairs were both important factors. She said,

It was something lower maintenance, smaller, downsizing, the main thing. The one-level house was also appealing. My bigger house . . . had stairs. This was one-level with a garage, which the other house had, and a fireplace. Those were my three must-haves.

### *Age-Restricted Community*

It was important for many people that they live in a community that would afford opportunities for social interaction with people in their own age group. “That’s a phase of life. We don’t have kids at home, haven’t had them at home since 2004.” The reasons participants favored an age-restricted community can be largely divided into two general themes. 1) Many were attracted to the possibility of social interaction with people within their age group, and 2) Many sought to actively avoid the presence of children, teenagers, and young adults. Dave noted that in their previous neighborhood, “. . . we had very few neighbors that we really knew very well. They were always working.” He went on to say, “Here, we have a lot of neighbors that are close to our house, and we actually know them quite well, and I’ve sort of surprised myself that I enjoy having neighbors that are close.” Dolores makes a similar point, saying

I looked at places in both the towns where my daughters live, but I really thought I needed somewhere social to go so that I could meet new people. That was my biggest fear—not knowing anybody. I didn’t like that.

Stanley commented that “it became immediately apparent that most of the residents that are in these age-qualified communities are in an age group where they’re doing similar things.” The move came at a time that made it easier to build community. He said,

This even turned out better than we thought because of the way we moved in, brand new, whole section, we ended up with a whole bunch of neighbors coming in in a very short period of time, none of whom knew each other, until they got to know each other. In a mixed aged community, not only did people have their own activities that they wanted to do, but their kids were running helter-skelter every direction, and by the time you get into that age 50-plus area, most of the kids are out of the house.

The absence of children is an important draw for many of those interviewed, most of whom have raised children themselves and enjoy their grandchildren. They prefer to live in a quieter community and one that centers around adult interests rather than families and kids. Karol talked about looking at condos in neighborhoods with “. . . lots of families and lots of kids, and lots of kids’ bikes. And that’s not our scene right now, with where we’re at.” She goes on:

. . . not that we don’t love kids, but this community was very appealing because it’s kind of everybody in your same stage in life, and just sort of not the whole ‘kids in the neighborhood’ type thing. . . . we’re just at a different place.

Carol gave a similar perspective on the lack of children in the community:

I don’t like a lot of little kids running all over. I used to. I mean we lived with lots of kids in our neighborhood, and it was great as my daughter moved through K through 12, and that was great. And then pretty soon, it wasn’t so great. The kids had a motorcycle or something was just driving me crazy and screaming and hollering. And I love children, but I guess I was ready to move away from children.

A few participants enjoyed the quiet of the community but also felt sadness at the lack of intergenerational interaction. Ray commented that liked the community and not having to deal with rowdy, boisterous children but “you also don’t get to see the nice ones.” Debra moved to Sequoia Heights from a mixed-age community where she had lived for 17 years and had enjoyed the presence of children.

Here, the area is very quiet. You don’t really ever hear children. Well, there’s a house just behind us and we sometimes hear grandchildren, but I love that. None of that ever bothers me. I love the sound of children. But I would imagine some people might come here for just the quiet, the serenity, the peacefulness. I mean, it’s so quiet.



Mark acknowledged “that’s the phase of life” he is in. “We don’t have kids at home . . . yet this is the home that can accommodate them when . . . [they come home]. Like Ray, Mark feels a sense of loss without children nearby. “Sometimes, I miss little kids running up and down the street on their bicycles.” He is not concerned by noise. “It doesn’t bother me one way or the other.”

### ***Proximity to Family***

A few participants used the phrase “Microsoft grandparents” to describe older adults who move into the community, usually from another region of the country, to be near adult children who work at one of the large software or technology companies that employ thousands and draw people from all over the country and internationally. Common experiences are like that of Ray, who said,

Our daughter . . . got married back east, had a two-week honeymoon, courtesy of Microsoft, and then went back to Bellevue. We used to come out to visit, of course. And one time when we came out, our daughter asked us, ‘Where are you planning to retire?’ It wasn’t in the near future, and we hadn’t thought about it. She said, ‘Well, what about out here?’

It is common for residents of Sequoia Heights to have commuted back and forth, making frequent visits before finally deciding to move. Dolores said,

. . . my children had all gone to college, they had all graduated, and two of them had gotten married, and they had just kind of settled where they were going to be. We’re very close, and I love my grandchildren and it’s so much fun to be around them. My grandkids all lived up here. I knew that I just could not drive I-5 for three and a half, four, four and a half, sometimes five hours when I wanted to come. They’re busy during the week because they all work, and the kids were going to school. So, it was really the weekend that I would want to be here and that was the worst possible time in the world to drive.

### ***Amenities***

In speaking to participants in interviews, the overall amenities available came up frequently as a reason for choosing to live in the community. Page reports of her husband, “He wanted to play golf. I was still working so I didn’t really care where we lived.” She goes on to

say, “The community was still under development at the time the couple purchased the house. There was nothing but an empty lot next door on a street that is now fully developed.” Carol discussed the amenities in Sequoia Heights as follows:

What they were offering here was very attractive to me, the fact that they had the swimming pool, and then gradually I started doing the gym too, and from a physical standpoint it was very good for me. And [my husband] has always wanted to walk outside. He used to run outside, but now . . . he has to walk. He likes to be outside all year long.

The setting itself is part of the appeal with the trails offering safe and easily accessible places to walk. Many participants, such as the one quoted below, make use of the trails regularly and balance this form of exercise with indoor amenities available in the Center for Wellness.

Karol said

I love the walking trails. I walk every day, and they’re just so fabulous. And I love the yoga. I do that a lot now that that’s back open, and just the clubhouse and the spa. All of it, we love. The yoga studio is all windows, floor-to-ceiling, it’s a huge, beautiful room, and it looks out on the pond and the golf course, and it’s just such a peaceful setting. Deb and I usually would go together.

### ***Dissatisfaction With the Community***

Not all participants were happy with their decision to move to Sequoia Heights. Several of those I interviewed mentioned the problem of people leaving soon after having arrived, failing to find what they were looking for. Michele, who originally lived in California and had few friends in the area because of a busy work schedule, moved north on the advice of a friend who lived in the area and because she enjoyed the local opera scene. “I came up and visited, and I said, ‘Oh, this looks fine. I guess I’ll move here,’ she chuckles. She was persuaded to move to Sequoia Heights by friends who thought the age-restricted nature of the community would be a bonus for her.

I had people telling me I needed to go into areas where there would be people of my age, with whom I have a lot of common interests and blah, blah, blah. At the same time, a friend introduced me to this group called Newcomers, which is made up of women sort of

in my age group, all well-educated, readers, artistic, travelers. We just had so much in common. I really didn't need to come to Sequoia Heights, especially now that most of my friends are in this group, and I lead a couple of things within the group.

Living in an age-restricted community was not a largely positive experience for Michele. She acknowledged that it can be hard to find friendships in mixed-age group communities but finds the challenges do not outweigh the benefits. "There's just more diversity, and I find that interesting, and if I can sit down and talk to somebody of a different age, that's interesting to me, I enjoy that." Social opportunities were not as prevalent as she had hoped.

I found that a lot of the activities are catered to couples. So there, I wasn't a good fit there. . . . And then of some of the things I was interested in didn't result in very positive feedback from other residents. Like I'm an accomplished nature photographer, and I didn't get any positive feedback about that. I had some of those sorts of things happening.

Table 9 summarizes the characteristics of the community that most persuaded survey respondents to choose to live there. The three that receive the highest ranking (number of participants choose a first, second, or third place are 1) Type of Home, 2) Range of Activities, and 3) Proximity to Family. This closely aligns with interview responses

**Table 9***Most Important Characteristics of Community*

Community Characteristic	First Place	Second Place	Third Place	Top Three
Type of home	16	9	8	33
Range of activities offered	9	8	10	27
Proximity to family members	13	9	4	26
Age-restricted nature of the community	4	7	6	17
Cost of home	1	7	8	16
Access to medical facilities	2	4	9	15
Access to social opportunities	3	6	5	14
Landscaping services	1	4	6	11
Overall location of Sequoia Heights	5	2	4	11
Access to Center for Wellness	1	2	4	7
Access to trails	1	4	2	7
Access to children's playground	2	2	2	6
Access to cultural events (e.g., opera, plays, symphony)	1	2	2	5
Access to tennis courts/pickleball/bocce	2	1	1	4
Proximity to shopping	1	1	2	4
Proximity to sports and social venues	1	1	1	3

**Community Contributes to Activity**

Activity levels are relative to expectations and norms, like all human behavior.

Accordingly, people have different ideas of what an active community looks like and how it contributes to the activity of the people who live there. Stanley said, “I would say that there’s certainly a lot higher percentage of people that are activity-oriented here than any place we’ve ever lived. But I wouldn’t say it’s a majority.” He goes on to say, “[Some] may be active in the .

. . . part of the community where they live with people around them, but they're not engaged in what I would call community-wide activity.”

Sequoia Heights contains all kinds of people—some much more active and involved in the community than others. Page described some of her neighbors, who represent different types of residents.

There're so many people out here who are involved in a lot of things and my next-door neighbors over here who wouldn't fill out your paperwork because they couldn't because she's got her arm in a sling right now and she can't do anything for a month, but they played tennis. He plays tennis on a Monday and Wednesday. She plays tennis on Tuesday and Thursday. They're part of the tennis club, and my husband was a part of golf group and they played golf every Monday and Wednesday morning, and he would play sometimes four and five times a week, or he'd go up play by himself. . . . The lady across the street hardly does anything.

Dave echoes this idea, telling me on a hike we did together that he sees the community as being quite active, although there is certainly variation in terms of what people do. During our walk through the forest, we encountered a group of “serious walkers.” The leader, the participant told me, a woman, walks 10 miles per day.

The split in activity in community, with some being very active and others quite inactive, is emphasized by Carol who estimates that far less than half the Sequoia Heights residents are active in the community. “Otherwise, I think that I would notice in the gym, in the pool, that it would be hard to get equipment, it would be hard to get a lane.” She goes on to say

What I've noticed is that it's the same people, pretty much. Up in the gym, it's the same people in the pool, it's the same people walking, it's the same people at . . . the Lunch and Learns. It reminds me of PTA, it was the same moms.

Carol acknowledges that there are large groups of walkers who use the trails and many people who walk dogs. Less physical activities are also popular, such as cards. Some residents may be active in ways that do not utilize Sequoia Heights resources such as the fitness center, tennis courts, or walking trails. There are many who do nothing in the community at all. “There's

a whole group of people that just move here, they're paying for all the amenities and they're not using any of them. They don't go to the bistro; they don't do anything. All they do is go up to mail room and that's it."

Diversity of age, with the difference between the youngest and oldest members of the community being 30 or more years, may have an influence in activity level. Debra noted that

It could be like maybe even the neighborhood that they're in specifically, whereas we have, I think, a relatively diverse group with the 53-year-old, 58-year-old, and my husband and I who are in the younger group, and then a lot of older people. Some of our older people are so active.

Debra thinks that a possible downside of an age-restricted community is that it can make people feel older.

One of the things that I have heard, and that I guess, maybe I get it a little bit, is some people move into this community and because of the age population of the community, they find that it impacts them personally to feel much older than they are physically or age wise. And they feel like they're not ready for that. My friend and I go to a lot of the open houses, and we'll ask about why people are leaving. 'They're not so happy with the community,' is what we hear. And, of course, my son pokes fun at this place a little bit.

For those who do choose to make use of them, the many clubs and activities available at Sequoia Heights can help encourage activity for many people. Page said,

When I first moved here, I would go up to the Cascade Club. And they have this board up there that tells you all these different activities that are taking place. The only thing I ever did was go up there and check out books in the library. They've got a library up there.

Debra, who is not yet retired, discussed the advantages of in a 55+ community, saying, "I love the amenities, the clubhouse.' These have helped her branch out.

When we first moved in, and in, they let you have two weeks of as many classes as you want. I did that for two weeks and I loved it. I would try so hard to schedule four classes back-to-back, maybe with a little bit of a break, but I did the cardio, a stepping class, I did the rolling class . . . I did Pilates, I did yoga . . . We've gone into the billiard room and played pool. . . . I kind of want to get into the aqua aerobics. . . . Another thing my husband and I have gotten into recently . . . is pickleball, but just among ourselves. . . .

For some, involvement in the community itself is an important form of activity for some. For instance, Page noted that her late husband not only played golf but served as an ambassador for the community, talking to prospective new residents about the community.

He loved it. He had such a good time. He was a people person. I've only attended a couple of club meetings [since his death], and that was okay, because you're sitting listening to other people, and then I attended once a month, they had some sort of dinner and a band. But then again, that was couples. I mean I was there with some other singles, but I really didn't feel comfortable.

Dolores has the perception that people in the community are less active and interested in doing things than she is. This can be the result of aging and health problems.

A lot of them have physical limitations and they can't do the long walks or other things and that's really hard to watch. And it's sad, I feel bad. But that's life and part of growing old and there's a big span of age in here. There's a lot of people are in their 90s. We have two neighbors down the street that are young. They're really young to me. Sixty and one was 58 when I first met her, and that's really significantly younger. But they have lots of energy, and so one is still working. I think there are quite a few men who still work here.

One participant, whose comments I am keeping confidential, is quite a bit more active than many in the community and describes themselves as follows:

Most of them I would not put in the active category. . . . Their world extends to their family, but not a lot beyond that, if at all. . . . Some people are active, but not active in the community. Some are active but they're younger. . . . There are people who are somewhat active, but not particularly social. . . . There's about half of the people want to be socially active and half of the people just want to live here and be left alone.

The community, while targeted toward older adults, can be poorly suited to their needs. Socially, the well-established nature of the neighborhood can make getting involved in activities with other people difficult. Dolores remarked, "There's a lot of couples that live in here and that are already established." She goes on to say, "it's really hard to break in." In terms of accessibility, there are few concessions made to those with mobility issues that may make activity more challenging. Michele mentioned the lack of access to some scenic locations:

. . .[it] would be a nice thing, is if they had more benches to sit in, because people would stop to talk. And it also, for people that are having difficulty moving around, it isn't so formidable to go out and have a walk if you know that there's a bench nearby.

The lack of concessions made to those with mobility issues may account for what some see as a “too quiet” community, especially during the pandemic. One participant, who will not be identified, describes it as “ghostly.” They goes on to compare it to a another similar community:

. . . they have these huge houses, and the weather is horrible, so everybody lives inside these huge houses. And they do a lot of family things in the houses and parties and that sort of thing, but if you look at it from the outside, it's very quiet, feels kind of ghostly to me. . . You know what, it feels like Stepford Wives here.

Some residents express a lot of unhappiness toward the community. Of those I interviewed, only one fit into this category, but many others referenced people they knew who were unhappy or who had moved away because they were unhappy. One participant, who will not be identified, believes dissatisfaction likely comes from unrealistic expectations, “She's hated it here from day one and is very vocal about it.”

### ***Survey Responses About the Community***

The survey contained a section that included various statements about satisfaction with the community that participants were asked to rank on a five-point Likert-type scale. Means and standard deviations are provided in Table 10. The results incite a good level of overall satisfaction with Sequoia Heights, with an average item rating of 3.76. Low ratings (with an average of less than 3) were “I am highly involved in the community at Sequoia Heights” and “I would be willing to facilitate activities that are not available at Sequoia Heights.”



**Table 10**

## Overall Satisfaction with Sequoia Heights

Item	<i>N</i>	<i>M</i>	<i>SD</i>
Sequoia Heights provides ample opportunities for me to be active.	52	4.6	0.634
I can afford to do all the activities I would like to do at Sequoia Heights.	52	4.31	1.164
I have made friends at Sequoia Heights.	52	4.29	0.977
I enjoy socializing with my neighbors at Sequoia Heights.	52	4.27	0.915
There is something for everyone at Sequoia Heights.	52	4.21	0.893
I felt welcomed when I moved to Sequoia Heights as a new resident.	52	4.15	1.127
Sequoia Heights has met my expectations for a 55+ active adult community.	52	4.14	1.216
There are activities for all ability levels at Sequoia Heights.	52	4.13	0.95
Physical and health issues do not prevent me from being as active as I would like.	52	4.06	1.243
Sequoia Heights offers good value for money.	52	4.04	1.009
I enjoy using the trails at Sequoia Heights.	52	3.98	1.35
Relationship status does not affect my level of activity at Sequoia Heights.	52	3.98	1.244
Different age groups blend well at Sequoia Heights.	52	3.79	0.997
I would describe most of the residents at Sequoia Heights as “active” people.	52	3.75	0.926
There is adequate transportation to enable me to do all the things I would like to do.	52	3.29	1.538
My local street/block is good at giving people opportunities to socialize.	52	3.27	1.315
My values have changed dramatically as I have become older.	52	3.15	1.161
There are activities I would enjoy that are not available at Sequoia Heights.	52	2.96	1.386
I am highly involved in the community at Sequoia Heights.	52	2.87	1.372
Sequoia Heights provides ample opportunities for me to include family and friends who do not live in the community in events and activities.	52	2.77	1.215
I would be willing to facilitate activities that are not available at Sequoia Heights.	52	2.31	1.229

Survey results showed that respondents do slightly more activities per week using the community facilities than outside the community, and they interact regularly with other residents in the community. See the summary in Table 11. Both interaction with other residents of Sequoia Heights and activities outside the community contribute positively to quality of life.

**Table 11**

*Activities Per Week*

	<i>M</i>	Minimum	Maximum	<i>SD</i>
Activities Per Week Using Sequoia Heights Facilities	5.67	0	25	4.471
Activities Per Week <b>Not</b> Using Sequoia Heights Facilities	4.94	0	20	3.427
Activities Per Week with Other Sequoia Heights Residents	4.06	0	18	3.631

**Table 12**

*Contribution to Quality of Life*

	<i>M</i>	Minimum	Maximum	<i>SD</i>
Contribution to Quality of Life: Interactions with Other Residents	3.3	1	4	0.847
Contribution to Quality of Life: Activities Unrelated to Sequoia Heights	3.5	1	4	0.74

**Effect of COVID-19 Pandemic on Activity**

The first cases of COVID-19 to appear in the United States were identified only a few miles away from Sequoia Heights, in a nursing home in the suburbs of a large Western city.

Most of the country instituted some form of lockdown by mid-March of 2020, with social

distancing, masking, closure of most “non-essential” services, including gyms and hairdressers, quickly becoming the norm. The results of a survey item asking about the extent to which the pandemic had affected activity levels is shown in Table 12. (4 = Very much, 3 = Somewhat, 2 = Not very much, 1 = Not at all.)

**Table 13**

*Effect of COVID-19 Pandemic on Activity Level*

	<i>M</i>	Minimum	Maximum	<i>SD</i>
To what extent have COVID-19 pandemic protocols affected your activity level over the past 18 months?	3.49	2	4	0.635

These changes affected the types of activities residents of Sequoia Heights did and caused them to take adaptive measures to avoid boredom and isolation. As Carol succinctly put it, “Everything for a year and a half now has come to a terrible halt.” Ray said, “We joke, every day, you wake up in the morning and say, ‘Okay, what am I not going to do today?’ You could go to the grocery store and run errands or things like that, but you couldn’t really go to the mall and browse the stores.” Michele described it as “a whole year of just loss.”

### ***Changes to Activity***

Nearly everyone experienced a change to their daily routine. The changes initially came as a shock. Carol remarked, “When the pandemic first started, I was like, ‘Oh my God, what am I going to do?’ I was working out at the gym four mornings a week and doing swimming laps one morning a week.” With the facilities closed, there was no immediate replacement for these important activities. “I had always liked the gym. I’ve worked out in a gym for all these many, many years, and I’ve been a swimmer for 30 years, and so it was tough to let go of that.” Dave

also lamented the loss of the gym. “I use the gym, especially in the winter, pretty frequently, but all of that’s just gone, went away with the pandemic.” Dolores initially regretted her decision to quit working. “At first, I thought, ‘Oh my gosh, I wish I’d never quit working.’ But then I probably wouldn’t have been working anyway. I had a couple of friends who were on Zoom, and they all hated it.”

Life felt more constricted for many, who missed the freedom of movement they had enjoyed before the pandemic. Stanley said,

We had more choices before the pandemic started. We were active in the food and wine club, which was an every-other-month session which was basically a wine dinner, but we catered the dinner, and we catered the wine, the wine selections. We would go to the Veterans Club breakfasts, which are open to the whole community, and that was usually once a month. I used an exercise bicycle and then exercise room quite regularly. I was very active in a men’s breakfast group here. . . . We would have breakfast every Saturday morning and then it would be somewhere between 12 and 20 people would show up. Not only were normal activities altered, but many highly anticipated events were

cancelled, including graduations, family vacations, and parties. “If we hadn’t had the pandemic, I would have had another block party by now in the backyard,” Page said sadly.

Social interactions were especially affected for many people. Ray said, We haven’t gotten together with many of our friends, although we used to be able to get together with them at a lot of club events. Some of the things that we used to do a lot just couldn’t happen. Monday night dinners, for instance. Before the pandemic, you could sit at the table with seven, eight other people, some of whom you knew, some of whom you didn’t. They would have 50 people, five tables of 10 people.

Carol normally volunteers for a children’s hospital, along with the genealogy club, and Map Your Neighborhood, and derived great satisfaction from this involvement. “I really got to meet a lot of people and get them organized in their neighborhoods, and I loved that. And all of that came to a screeching halt with the pandemic.” The concerts several participants enjoyed attending in the community before the pandemic were suspended for more than a year. Similar

cultural activities outside Sequoia Heights also stopped. “We’re members of several art museums. We were going to all the plays at a couple of local theaters,” Carol said.

### ***Boredom and Isolation***

Boredom and a feeling of isolation have been a problem for many of the participants, who do not normally experience those feelings. “If I haven’t seen anybody for a while, I just walk outside and there’s somebody around.” Dave notes, “This changed during the pandemic since everything was closed and even package pick-up at the mailroom was limited to specific hours.” Page described the struggle to avoid boredom: “I walk around in my house, nothing on my schedule. I don’t know what to do with myself.” Dolores also fought off boredom, but was more successful. “I think it just got boring during the pandemic, that was the hard part. I was very lucky because my two daughters, we were very close, so we did a lot of things together.

Isolation compounded the effects of boredom. Michele had only just moved into the community when the pandemic was identified. She did not see many of her friends from her previous community during that time. “My friends were pretty scared, and I was too, to be honest. I’ve got asthma and so I’m high risk. Once we got our shots, then gradually we’ve been able to start seeing each other.” Coping with the isolation has not been easy. Carol said, “I had some days where I thought I was going to run screaming from this house. There were days when I did feel depressed because I could not see somebody face-to-face.” Debra feels that activity has helped with isolation. She said,

Otherwise, I probably might get a little depressed if I didn’t have my outlets. I just think it’s a good thing, just for your whole well-being. It’s so important to find even kind of like the yoga, for kind of a more mindfulness, meditative, and also the physical benefit of yoga applies. I think you need to tap into that too.

### *Adaptation and Survival Techniques*

Most people looked for alternatives to their previously cherished activities during COVID-19 restrictions, particular physical activities. Carol said,

I started walking, just doing my walks here, and I walk for an hour, which was the same as on the treadmill, and then I had my own free weights, and I did my stretches on the bed instead of on the mat at the gym. I figured out what to do. And I bought rain pants and I brought a rain jacket. And just got myself oriented.

Stanley said, “I walk the trails quite regularly and was able to continue that during the pandemic.” He went on to say, “I would do five or six miles . . . so that and then using the bicycling as an in-between bad weather activity.”

While the pandemic shut down virtually all the activities and amenities at Sequoia Heights for more than a year, they did provide some options via Zoom. These included numerous exercise classes. Opinions on these varied. Some saw them as a lifeline: “Zoom it is, and boy, we really needed it back in January!” Dolores said, “It was great. It was nicer than going to the clubhouse, except for not having a pool. You can just get up without having to be presentable. I always kept my camera off.” Online activities were not an adequate substitute for many of the older adults interviewed, and some chose not to participate. “I’m not a Zoomer,” Page said. She went on to say,

I tried it a couple of times. I didn’t like it at all. I tried to have a Zoom appointment with my doctor, and I had to go to my daughter’s house and she and I met with the doctor, but I didn’t care for it.

COVID-19 “bubbles,” in which a small group of individuals continue to interact with one another, were an important survival technique. Page reported avoiding boredom and isolation because of her grandson. “We were a bubble, so I had him during that whole thing.” Dolores reported:

We do a lot of family things. I had dinner in the garage almost once every other week. And then because it was a winter, a lot of the time it was freezing, so we’d set the table

out there and we had a heater blowing. But the grandkids loved it. They thought it was an adventure. I was like, ‘This is so cool.’ And then my little granddaughter, she is so funny, she decided she’d decorate the table every time we had one of the dinners, and she’d come in the house and bring some plants out to the garage, and it was adorable, so much fun. She really liked that. Sometimes we did come in the house, and I’d have them play upstairs. Nobody’s here, I don’t have to go upstairs, I can avoid the upstairs several days a week and not miss it. I just said, ‘You go up there.’ And then they got to play. And then I’d be busy with my daughter.

Joan recounted a similar experience with friends, who entertained outside and in garages. She said, “We started outside and then ended up in the garage because [my friend] had a fire pit from her son. That’s where I got the idea of buying a fire pit.” She went on to say,

Thursdays and Fridays, I had a social life, and I’m more of an introvert, so I don’t have high social needs. I also did book clubs. . . . I didn’t want to do online poker because it was conflicting with my other Happy Hours.

Dolores formed a family-centered pod with her sister, in the same way that many people did throughout the pandemic:

We did everything during the pandemic together, so we were kind of a little pod. She and her husband were very strict, and I was very strict, but they were stricter than I was, but it was fun. It worked out fine—we get food to go and have dinner together and do those kinds of things, which made it really nice.

For some, helping with grandchildren’s education provided an important outlet and a chance to be helpful to their adult children. Dave spent a couple months during the pandemic homeschooling grandchildren in a city some distance away. This was rewarding for him, but not always easy. The six-year-old became frustrated with Dave’s attempts to teach him and at one point said, “You won’t let me do anything I want to do!” “What do you want to do?” Dave responded. “I don’t KNOW!” wailed the child. Dolores’s granddaughters read to her every day over Zoom during the pandemic.

. . . they were Zoom-ing at home for the first part of the pandemic, and then they actually got to go to school because they were in a private school the last year and that kind of fizzled out because they’d been in school all day. But for a while she would read to me every day, and it was always her choice. And she’d show me the thing and she became

like my teacher, and she assumed the role just perfectly. She would show the book, and then she'd read to me. It was adorable, and she became so fluent, and her expressions changed over the year.

Involvement in the community was important for many. "We've definitely stayed active in the neighborhood." Stanley said. He went on to say,

Early on, one of our neighbors put together a map your neighborhood activity, basically emergency preparedness, and we all spent a lot of time getting that all put together, and I'm not sure what the shape is anymore. I haven't done any Zoom classes. I exercise at a different time. Every day I walk, and now recently it's been, every day I walk, every day I bike, and the walking is less of the activity than the bicycling is, because the bicycling is a little easier on the knees and the back.

Karol said, "I did a lot more puzzles than I've ever done before in my life." These were provided as part of a puzzle network in the community. "They had a puzzle drop-off at the clubhouse. You could drop off and pick them up." She also relied on friends and family, saying, ". . . I just had a very small group of girlfriends that I still walked with outside. And then my family, my kids—spent a lot of time with them. And . . . more cooking and eating . . ."

### ***Beginning of End of Restrictions***

The summer of 2021, when I collected data in the community, restrictions were beginning to loosen before the subsequent surges in cases in Fall of 2021. People were beginning to do things they had not done for more than a year. Three friends from Sequoia Heights celebrated birthdays together at a favorite restaurant. Page invited a group of women she has known since they served together on the PTA in the 1980s over for a garden party. This same participant reported "practicing" entertaining by inviting a few neighbors over for dinner, which she orders from a restaurant because she does not like to cook.

During summer of 2021, there was a move back toward a more "normal" level of activity. Michele said, "I just bought a new camera, and my friend bought the same one. She's trying to learn from me, and we're starting to make these little trips." Michele had recently



started to have lunch with friends again. She took her time before returning to hair and pedicures appointments but still returned earlier than most of her friends. “I have to admit, I went earlier than anybody else, but we were all joking about how long our grey roots were and we were looking forward to facials and pedicures.” She attended the first newcomers’ social. “I play Euchre with the group, and we all got together at somebody’s house. It felt great.”

Even when activity began to resume in the summer of 2021, following the wide availability of vaccines, many Sequoia Heights residents remained cautious and were someone reticent about resuming usual activity. Carol, who had adapted her physical activity to consist of walks outdoors rather than at the gym, continued to walk outdoors and had not resumed going to the gym or the pool. Both were available on a reservation-only basis, and she prefers more spontaneity in her day. She was also continuing to be very careful about social distancing. “I’m pretty happy with my exercise. But when winter comes around, I’ll probably start using the gym again. And of course, we’ll have some meetings up here.” Sharon was looking forward to using the swimming pool at the clubhouse.

I love the pool. Of course, it was closed during COVID, but I think they’re going to open it pretty soon. Now you can go with reservations, that type of thing. But I think they’re really going to open it again like they used to have it, which will be great.

How the participants’ lives will change moving forward is hard for them to predict, but they have hopes for a return to certain favorite activities. Ray said,

I suppose that that depends on external factors. I’m sure they will start up, since they’ve been having the take-home dinners three nights a week, I’m sure they’ll go back to the Monday night dinners, and we’ll go to that. And the Food and Wine Committee will get back together, and we’ll go to that. I was part of a musical group, and we went to nursing homes and retirement complexes or whatever once a week and sang for different groups. . . . I’m hoping that that will get back in operation, but that’s one of those things where I don’t know who’s going to come back and who’s not?

### ***Possible Benefits***

Although COVID-19 brought challenges, it also created unexpected positive outcomes for many participants. It has caused some to be more reflective. Debra said, “. . . you think about making changes to better yourself maybe. I’ve really gotten into getting to know the trails around here, and actually knowing the number of steps that each trail takes. And I feel better.”

She also said, “I have exchanged in a rock exchange, and I loved the saying on the rock that I took. It said, ‘Be the change.’”

Many participants became more physically active and were happy about that. Debra said, “I love to bike, I love physical activity, especially since I’m at a lesser weight now, I think I can manage being more physically active than I was. Before all this started, I was overweight. I don’t know if it’s the COVID thing, which I wouldn’t say has been good, but I guess maybe sometimes good things come out of bad things.”

Dolores said, “I did a lot of walking during the pandemic, and that was great. I loved it when the golf course closed.”

Practical tasks changed in ways that many enjoyed. “My groceries were all ordered out. I was happy,” Joan said. Others had more frequent takeout food, often ordered from the one-site bistro. “I hate to cook now,” Carol said. She and her husband check out the menu for the upcoming month and decide which nights they’ll order food. Even some forms of employment took on a different and more positive quality. Debra, who still works as a teacher, said,

We had all kinds of activities. I would do cooking from my kitchen and have them follow along. We had art too. I had to be over the top creative. I loved, loved, loved, loved, loved, *loved* that. You had to think out of the box. To push through it, and many more ways than one, whether it was a workday or not.

Personal relationships grew in many cases—or, at the very least, changed. “It’s been good and bad. It’s been mixed,” Joan said. She went on:

It’s brought me closer to some people. I’ve formed tighter alliances with some people. . . . Then I took up making pizza. I made pizza every week. That’s been a kick because there’s so many different kinds of pizzas. It’s just absolutely a riot. You can turn anything into a pizza. . . . And we’d sit and drink and talk.

### *Survey Responses*

One survey item, scored on a four-point Likert-type scale indicating the extent to which COVID-19 restrictions affected activity, was, “To what extent have COVID-19 pandemic protocols affected your activity level over the past 18 months?” The mean score was 3.49 ( $n = 55$ ) which indicates a relatively high level of impact on activity. Participants were invited to offer brief explanatory comments along with the ratings. Those indicating that COVID-19 had “very much” affected their activity level made comments such as, “A real downer: Much less activity,” “Can’t do much of anything at the Clubhouse,” “Have been very close to home and very careful to not come in contact with many people,” “Have given up movies, most shopping, having to wear masks during exercise, keeping socially distanced,” “I used to go to the gym 3 times a week and participate in more events.” A few reported less dramatic changes to their activity level. They made comments like, “I bike a lot. No problem,” “I still get out regularly.”

Participants were asked to predict their future activities in the following open-ended item: “What activities do you hope to prioritize in the future?” Responses largely fell within the areas of 1) Increased physical activity (“Use of the pool,” “Becoming for physically active,” “Bikes, diving, skiing,” “More walking”), 2) Increased social activity (“Making friends,” “Being inside with many people,” “Going to the movies,” “Social get togethers”), and 3) Resumption of use of community facilities (“Club activities,” “Games, lectures, presentations,” “More on-site classes,” “Participate in more groups/clubs,” “Would love to go back to yoga.”).

It is evident from both interview and survey responses that the COVID-19 pandemic has had a profound effect on daily life for the participants in this study, particularly in terms of their ability to exercise, socialize, and use club facilities. While most look forward to returning to

“normal” activity, many have engaged in adaptive measures that have allowed them to remain active, continuing to enjoy their lives.

### **Other Barriers to Activity**

Since this section addresses health concerns experienced by participants, I did not identify them by name and made efforts to conceal identifying details. Many participants have experienced injuries or illnesses that have affected their ability to be active. Some of these occurred during the period of time I was living in the community. Many of these illnesses are serious or will become serious. Several residents discussed the number of people in the community who have died recently. “We lost two in the last month and a half,” one said, going on to add, “if you go up and down the street, a fair number have passed or gone to the next stage” [assisted living]. Another points out that the “active lifestyle” is “not for people with dementia; they can’t go out and about. Some can’t walk.” During my time in the community, I witnessed a woman who appeared to have dementia whose husband came to find her early in the morning after she had apparently left the house. Ambulances in the community were a common sight. Many residents are anticipating changes to their status, with discussions about “the next steps” and a nearby assisted living facility coming up frequently in conversations.

### **Preferred Activities for Older Adults in a 55+ Active Adult Master Planned Community**

The third research question was, “Which activities do older adults in a 55+ active adult master planned community prefer?” This question was addressed with data from interviews and survey responses, as well as participant observation. Activity journals collected from participants revealed a wide range of activities done by participants over their two-week recording period. These were organized into 10 categories: 1) Physical, 2) Social, 3) Intellectual, 4) Practical, 5) Employment, 6) Volunteer, 7) Personal Improvement, 8) Passive, 9) Entertainment, and 10)

Special Events. Responses to survey items and interview questions indicate that physical, social, intellectual, and practical activity are the types of activity participants engage in most frequently. Many of them also indicate that they enjoy these activities, but also express greater enjoyment than frequency for special events and entertainment. The following sections detail the activities participants ranked by frequency and enjoyment, along with participant descriptions of favored activities and an “ideal” day, and a table showing the activities I did with participants.

### **Activity Ranking**

Activity journals collected from participants revealed a wide range of activities over their two-week recording period. “I was especially impressed with the list of activities that . . . residents identified,” one participant said (Personal Communication, August 24, 2021). The compiled activities were organized into 10 categories: 1) Physical, 2) Social, 3) Intellectual, 4) Practical, 5) Employment, 6) Volunteer, 7) Personal Improvement, 8) Passive, 9) Entertainment, and 10) Special Events. The survey co-created with the item suggestions and feedback of participants provided two ranking options for activities. The first asked respondents to rank the ten categories of activity according to how often they participated in them. The second items asked respondents to rank the same activities in order of their enjoyment.

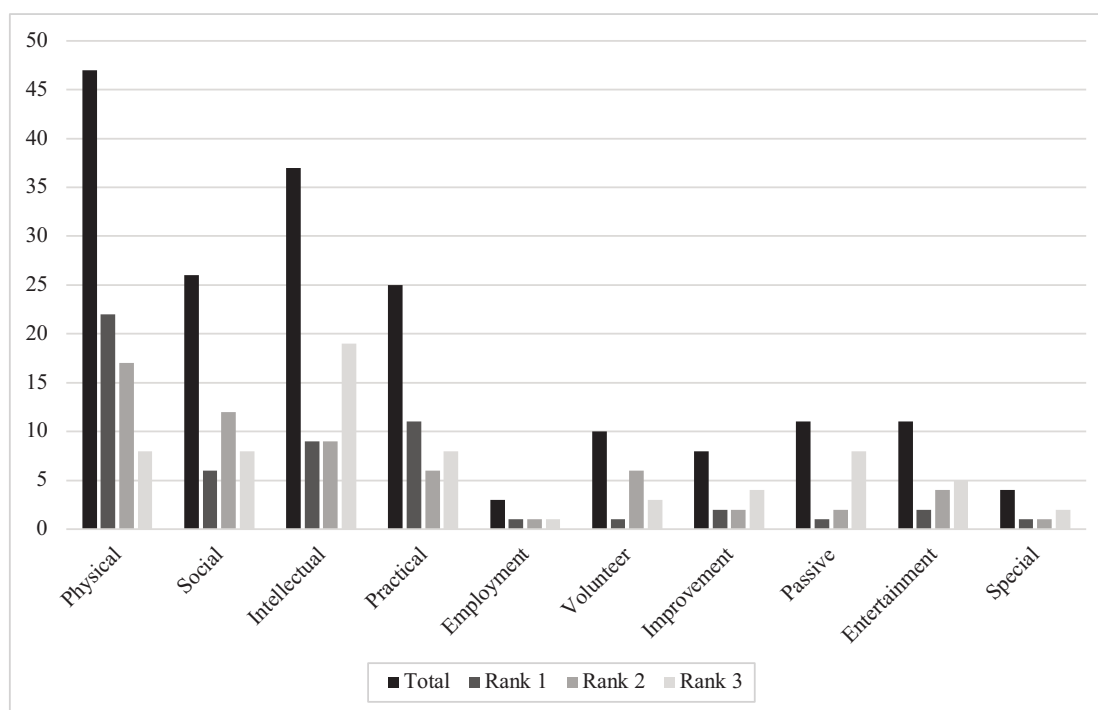
### ***Activities Ranked by Frequency***

Responses to survey items and interview questions indicate that physical, social, and intellectual activity are the ones participants engage in most frequently. Many of them also indicate that they enjoy these activities. The survey confirmed the content that emerged from interviews. In speaking with participants, it was clear that many engaged in regular exercise and enjoyed it. They also consistently noted regular social engagements, whether those were with other residents in the community, outside friends, or family members. Most spent time with activities that exercised their minds, including reading, playing games, taking classes, or

attending lectures. While practical activities might seem likely to be ranked number one in terms of frequency, there were only ranked in fourth place. This could be because many participants do not count routine matters as “activities,” since they often do not involve “going out” or using time in a way that seems special or significant. Figure 3 shows the top three ranking for frequency of activity.

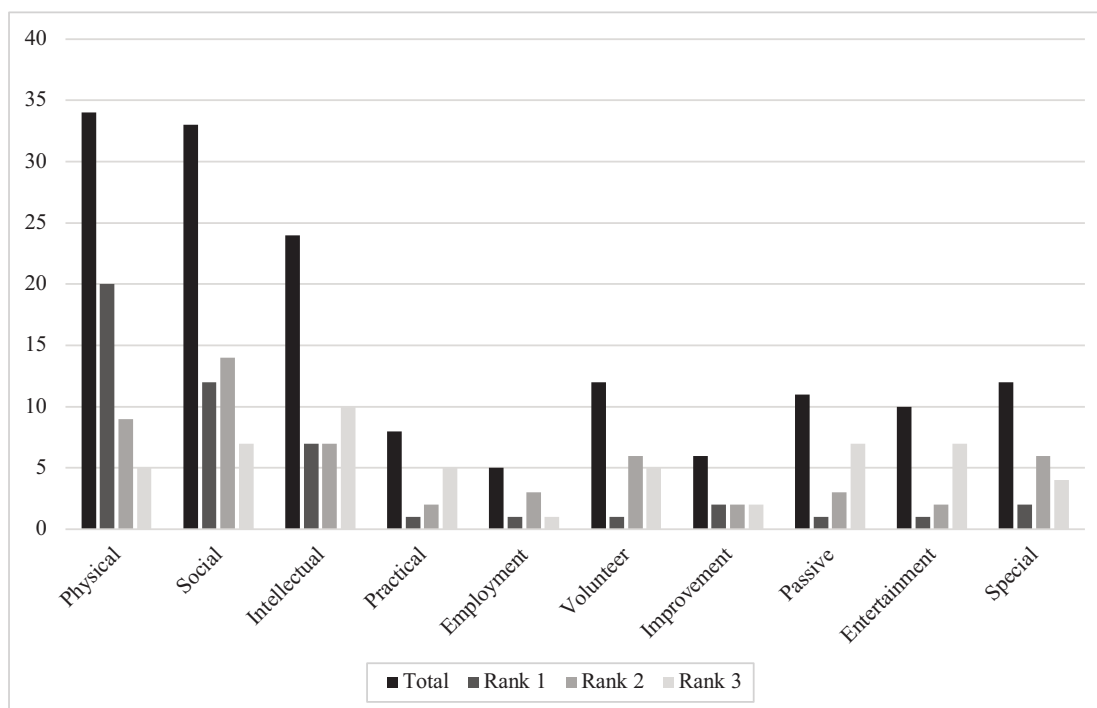
**Figure 3**

*Top Three Rankings for Frequency of Activity*



***Activities Ranked by Enjoyment***

Responses to survey items and interview questions indicate that physical, social, and intellectual activities were also the ones participants most enjoyed although entertainment, special events, and volunteering received much higher rankings when considered from the perspective of enjoyment rather than frequency of engagement.

**Figure 4***Top Three Rankings for Enjoyment of Activity***Preferred Activities Indicated in Interviews**

In speaking with participants, it was clear that many engaged in regular exercise and enjoyed it. They also consistently expressed a preference for various types of social engagement, whether this meant time spent with family or friends, or structured activities in the community. Few in this affluent community continued to work. Most continued to do the kinds of things they had enjoyed at previous stages of life, with more time to devote to leisure activities. A few examples of activities the participants enjoy are provided below and have been selected to show the variety of activities people at Sequoia Heights like to do.

**Continuing Education: “I’m More Active, I’m More Open, I Want to Know More”**

Carol considers herself more intellectually curious as she ages. “I am an information junkie, I love learning.” She goes on to say

I’m more active, I’m more open, I want to know more, what about that? . . . I’ve always been a curious person, always want to know how something works, or can we take a tour and see what’s going on there?

Carol takes many continuing education courses, and during the pandemic she watched numerous online presentations, classes, and seminars. Online lectures at Sequoia Heights, provided free of charge, have provided Carol and her husband with regular intellectual engagement.

You’d laugh at us, we’d go to the computer, and we get our TV tray, we each have a TV tray at the computer, and then I get us all tuned in, and we eat our lunch, and we listen to the Zoom. I also do Washington Humanities, which I learned about through Osher. They do lectures, but they’re not always at noon. I’ll do one at 11:00 or in the afternoon. I don’t like the evening ones anymore. Then we found out about the Holocaust Center for Humanities, and so we tuned in, and I thought, ‘Whoo-hoo, these folks have got a fabulous speaker’s bureau here every Tuesday, every Tuesday at noon.’

***Reading and Television: “I’ve Stayed Up Till 1 O’clock Reading”***

In addition to taking care of her grandson and socializing with neighbors, Page likes to read love and romance books by authors such as Karen Kingsbury and Jan Karon. “I’ve stayed up till 1 o’clock reading, because I wanted to finish the book.” After her husband passed away, she started to do puzzles at night because she struggled to sleep. She also enjoys television, such as Hallmark movies, but she does not stay up at night to watch them anymore. “If I see something I think I might like, like the Hallmark movies, I record them, and then I watch them later, so I can skip through the commercials. And I don’t have to watch the news. I don’t ever have to watch the news.” She used to watch *NCIS* with her husband, but it’s become too violent. Page also finds *America’s Got Talent* has become “too weird.”



***Hiking: “I Like the Things That I Can Do”***

Dave summarized the importance of being active as he ages in one sentence: “It allows me to continue to do the things I want to do.” He goes on to say,

I get to hike and climb—not climb as much, I just really like to hike. We’re going out this summer for two and a half weeks in the North Cascades. Three years ago, we circumnavigated Mont Blanc in France. We circumnavigated Mount Rainier, we circumnavigated Mount Adams. The year we did the Wonderland Trail, only 250 people made it completely around. It’s harder now because you have to get a reservation and if you can get one, you’re just damn lucky because there are so many people. This next trip, we’re backpacking. We’re going to start near the south end of Lake Chelan and we’re going to end up at the Canadian border. . . . I like the things that I can do. I like to be with my grandkids and be able to wrestle and climb on the jungle gym with them, and work on the trails and hike. And if you don’t exercise, you lose that.

***Group Games: “I’m Joining Bunco”***

To expand her social network beyond her family, Dolores joined the Singles Club at the clubhouse. She has really enjoyed this experience:

It was a great way to meet a lot of people. I had heard about it from one of the open houses for new people. And it just sounded good because it is singles and it is drop-in—you don’t have to make a reservation, you don’t have to feel super organized, you can change plans in a minute and so you always meet new people. And so, I liked that because then when I went to the clubhouse for the fitness center upstairs or took a class, I did water aerobics, I could walk through the club and say hello to somebody. I liked being able to say, ‘Hi’ and they would say hi back because we had met somewhere before. I played Bunco, which was a silly game, but it is very social. When I was a supervisor, other employees played Bunco, but I was advised not to because of my role. I had always wanted to learn Bunco, so when I saw it on the list of 63 clubs, I was like, ‘I’m joining Bunco.’ And it just was a fun place to go with people and you play this dice game, and you don’t have to think too hard about it. The Singles Club meant that we could have buffets, or bringing something, a dish and have dinner together in one of the rooms in the clubhouse, and so it made it kind of nice that you didn’t have to worry about having a partner.

***New Experiences: “I Play Texas Hold ‘Em Now”***

Joan, who has tried to learn all kinds of things—from sailing tall ships to becoming an expert on miniature conifers—continues to emphasize bringing new experiences in her life. She said,

I just figure, I just need to be open to learn new things like, I never played poker. I play Texas Hold ‘Em now. I can do it once a week if I want. For a couple of years here, I played every Saturday night with a group of people. I will play occasionally on a Saturday, and I’ll go back to twice a month. And then there’s a women’s poker group that I’ll play with. And I play Mahjong once a week. I also belong to a garden club. That’s not here. It’s part of Northwest Perennial Alliance. Gardening is still a passion. My problem is I’ve ran out of space; and I need to take a plant out of a pot out here, but I can’t find the spot to stick it.

***Exercising: “Walking the Trails . . . Makes Me Feel Like . . . I’m on Vacation”***

A few participants mentioned being afraid to walk in the forest because of the possibility of encountering animals such as bears or cougars. Most I spoke with who were physically able to manage the uneven terrain enjoyed walking on the trails and considered them to be an asset to the community. Karol, who particularly enjoys the trails at Sequoia Heights, said,

Walking on the trails . . . makes me feel like I just live in a resort or I’m on vacation, like I’ll go out by myself even and just feel so amazingly peaceful. I get in the woods, and it’s like I’m not even at home. I’m just on vacation somewhere.

She also is especially excited at seeing the wide variety of wildlife on property, sometimes in unexpected contexts.

It was the weirdest thing. I was out walking with a friend, and we saw this deer swimming in the pond. I’ve never seen a deer swim. It was just the craziest thing. He or she got in and swam to the other side and got out. I sat there and recorded the whole thing. And I’m like, ‘Can you believe this?’ And just as I was saying that, and I looked to the left to talk to her, there’s a bear in the background. I was like, ‘Oh my gosh, this has been such a week!’ I think there’s a couple of bears in here that make the rounds. They’ve been in our neighbors’ garbage can more than a couple of times. There was also a bobcat just up the street lying on this log just outside one of the houses, and it let me take pictures of it and everything.

***Protecting Health: “I Started Walking for Exercise After I Had a Heart Attack”***

For some people, the activity lifestyle has always been a feature of their daily routine while others have become active later in life, often because of health scares. Stanley recounted his growing interest in being physically active:

I started walking for exercise after I had a heart attack, 1990. And about a year into that, I had the heart attack in October. My doctor said, ‘I want you to start walking, and I want you to keep a log.’ I started doing that, and I exceeded his expectations, because I said, ‘Well, okay, I’ll decide each day where I’m going to go, but it will be a walk.’ . . . [For a year] there were just nine days I missed . . . [Then] I said, ‘Why am I going through this rigmarole in the morning, deciding what I’m going to do? Just make it part of your lifestyle and don’t decide whether you need to do it that day or not, because clearly, you’re doing it most of the days.’ I said, ‘Okay, if I’m going to do that, I better have a goal.’ I thought about that log, and I said, ‘Okay, I’m 54 years old, 50,000 miles by my 88th birthday.’ And try not to miss a day. I went 11 years, after a day in July in ’93, which when I discovered I had a stress fracture, and I couldn’t walk across the living room at Pack Forest, had a stress fracture in my femur, so I missed that day of exercising.

***Freedom: “I Can do Whatever I Want, Which is Wonderful”***

Sharon values time with family and unstructured time in general, doing simple tasks that bring pleasure. She said,

I love spending time with my two grandchildren. I like going to the park with them, or some other activity with them. And I love to go shopping with my daughters, of course, we love to get together. But they’re busy with their own lives too and have time commitments with their families. I enjoy taking the ferry with the kids.

She often does errands with one of her daughters, such as going to Costco or shopping at a mall.

Just out and about. I think I’m less active now as far as the nine-to-five type. It’s just more relaxed. I can do whatever I want, which is wonderful. I can entertain myself. I enjoy going to the mall, although it’s better when my daughter comes along. We take the kids too, and then we don’t get my shopping done, but we have fun. We go for haircuts.

***Solving Problems: “I Started Thinking About It”***

Ray, who has always been scientifically minded, likes to have something to do that will take not only a chunk of time but some creative energy. He likes to solve problems. He currently has three projects in keeping him busy. One is installing a wine rack in a specially designed and climate-controlled room in this house. Of the other two, he explains

We bought some fabric, quilting fabric, and I need to make armchair covers, well, whatever you want to call them, for the desk chair in there, because the lip leather, the plastic, whatever it is on the arms has worn off. I said, ‘Well.’ I looked at it and I said, ‘I could just take some quilting material and then make a little cover, maybe, and make it with a drawstring, and that will cover their arms.’ So that’s on the agenda.

**Summary of Activities Participants Enjoy**

There is a wide range of activities that residents of Sequoia Height enjoy. They range from the ordinary to the special. Some are longstanding interests while others have come as the direct result of living at Sequoia Heights. The following section gives examples of what participants see as an ideal day, further highlighting the activities they prefer.

**An Ideal Day**

To determine what activities participants preferred, I asked the following interview questions, loosely phrased as, “What would an ideal day look like for you?” As in the previous descriptions of activities people reported enjoying, the following brief summaries presented in a table (Table 14) show the variety of responses in participants’ own words. Each is categorized as 1) Special, 2) Routine, or 3) Combined.

**Table 14***Descriptions of an Ideal Day*

Description	Categorization
Go for a hike and out to dinner.	Special
Leisurely breakfast, TV news, check the stocks, read emails, walk, meet friends for lunch.	Routine
Pickleball or tennis and reading.	Routine
Drive out to a lake in a sports car.	Special
Newspapers, coffee, exercise, breakfast, volunteer work, read, work, dinner, TV	Routine
Take morning and evening walks, computer time, go out in the RV.	Combination
A little bit of work, breakfast with iced coffee, walk on the trails, work in the garden, paint rocks.	Routine
Newspaper, walk, stretches, shower, email, TV, and read in the evening.	Routine
Get up early, photography, Japanese flower arranging, lunch with friends, photography, opera.	Special
Spend part of the day with grandchildren, and then go shopping with daughters	Special
Have people over to the house for a block party. Sit on the deck and read.	Special
Meet with friends at the arboretum and go for a walk, just hang out maybe at the farmer's market or going for a meal. Something relaxing.	Special
Coffee, crossword, shopping, lunch with a friend, spa treatment, buy plants, simple dinner, TV.	Routine
Go to exercise class, work on a project or household task.	Routine
Wake up slowly, have a plan of some kind that involves going out.	Routine

**Participant Observation: “What Can We Do Together?”**

I spent six weeks living in the community and doing frequent activities with research participants as part of the study. I asked them to do an activity with me that was something they enjoyed or typically did and that would give me insight into the kinds of things they like to do. Some found it easy to think of an activity while others were hesitant, perhaps because they were unsure of what I might like to do. In most cases, I suggested an activity they had mentioned during the interview or something they had included in their activity journal. A few activities I wanted to do and suggested were not feasible. For instance, I wanted to attend a Japanese flower arranging class, but the instructor was not comfortable having an observer. Similarly, some of the events sponsored by Sequoia Heights were closed to non-residents. In some cases, I did activities on my own that had been suggested to me by participants or that were advertised to the community. Examples include walking all the community trails (~15 miles) in a single day and the garden tour. Table 15 shows this information as well.

I had hopes that certain activities in the community would be possible that were restricted to residents only. For instance, Paul tried to gain access for me to attend two different concerts that he videotapes, and they were for residents only. Likewise, there were activities that were not possible because of participant restrictions on activity or scheduling issues. I included anything I did with participants outside of formal interviews as an “activity,” and included things I did alone that were community-related activities, such as the silent auction or the garden tour.

**Table 15***Participant Observation Activities*

Participant(s)	Activity	Date
Page, Michele, Dolores	Lunch	June 23
Page	Puzzle	June 28
Stan, Kay	Dinner	June 29
Dave	Hike	July 1
Page	Dinner	July 2
None	Walk All Trails	July
Paul	Online concert	July 5
Michele	Photography	July 8
None	Garden Tour	July 10
None	Silent Auction	July 10
Ray	Wine-shelving	July 12
Carol	Lunch & Learn	July 13
Stan, Kay	Veterans Breakfast	July 14
Stan, Kay	Sequoia Heights board	July 14
Debra	Manicure	July 18
Lin	Coffee, knitting	July 18
Page, Dolores	Dinner	July 20
None	Geocaching	July 22
Stan, Kay	Sightseeing	July 22
Mark	Beer-making	August 16
Peter	Club fair	August 17
Sharon	Lunch	August 18
Page	Play with grandson	August 19

### *Field Notes*

In addition to participating in the activities, I took field notes. Over the entire period I interacted with residents, including before data collection officially started, I recorded 47 pages, or almost 20,000 words, of notes. One early note made the following observation about the community: “I’ve noticed how friendly people at Sequoia Heights are. Lots of walkers and people out in the morning who offer very warm greetings. I like seeing all the couples of walk together” (Field notes, June 21, 2021). I continued to have very pleasant interactions with people as I interviewed them, and, in many cases, participated in one activity or more during the time I was staying on site.

In addition to recording notes about my interactions with participants, I made notes about unusual things that happened in the community that helped give a more complete picture of Sequoia Heights. On one day that reached a record temperature of more than 110F, I wrote the following:

At about 5:45, I came across a woman who was highly agitated. She stopped me from running. She said, “There are animals everywhere. We have to get out of here.” She was clearly terrified. I asked what kind of animals. She was confused but reiterated that they were everywhere, gesturing that they were large and small and everywhere. I offered to walk her to her house, since we would be safe together. She agreed, greatly relieved. Her name was [redacted]. We talked only for a few minutes. I told her my mother had died, that I was visiting. She said a few more things about the animals, about her brother, about her husband. She didn’t make a lot of sense. “My husband doesn’t know,” she said suddenly. A car approached us, and she started to wave at it. “That might be my husband,” she said. She ran into the road ahead of the car. It slowed to a stop. The driver seemed to know her. They spoke briefly. She urged me to get into the back seat. When I repeatedly thanked her and declined, she told the driver she was going to stay with me. Maybe to protect me from the animals? He drove away. Just then she seemed to see something. She began to shout, “Mike, Mike,” and ran after the car. He made a U-turn and picked her up. She stumbled across the road, nearly tripping. She looked at me briefly. I gave them both a thumbs-up. They drove away. The woman appeared to be in her seventies. [I later discovered that she was 76.]

This is an unusual occurrence, but it does illustrate the kinds of experiences and observations that are possible when a researcher is embedded in a community, living life daily



with the people who live there. Sequoia Heights certainly contains many people who are active, healthy, and thriving in older age, but incidents like this one, along with the routine ambulances that appeared in the community, along with stories about illnesses and injuries, reveal the reality that often comes with aging, in any kind of community.

### **Photographs and Artifacts**

I took hundreds of photographs in the community, from February 2021 to April 2022. Most depict scenery and facilities, but a few are photos of research participants. I also collected numerous artifacts, including flyers advertising activities in the community, informational brochures, and monthly activity booklets available to residents at the clubhouse. I have selected just a few examples. Appendix I includes images from around the Sequoia Heights community.

### **Summary of Chapter IV**

This chapter has examined the results of three research questions. The first question was, “What are considerations for involving older adults in a 55+ active adult master planned community as co-creators of research?” The data, collected from interviews, observation, and research journal entries, points to several important considerations in involving older adults as co-creators of research. First, the data supports the conclusions of other researchers (e.g., Applewhite, 2016; Partridge, 2022; Suarez-Balcazar, 2020) who see co-creation as uniquely valuable. Many older adults have both the skills and motivation to provide valuable assistance in creating research. In this study, their contributions were especially valuable in helping me gain access to the community, providing insider information, and making suggestions for greater participant involvement. However, both interview responses and observations suggest some hesitancy about heavy involvement in research. Most of the older adults included in this study indicated a willingness to be helpful but did not want to engage in research if it meant sacrificing a great deal of time and energy, which they prefer to spend in other ways. Recruitment of older

adults as co-creators of research requires extensive communication to make roles and expectations clear.

The second question was, “What is the meaning of activity for older adults living in a 55+ master planned community?” The data were collected from activity journals, artifacts, interviews, observation, and research journal entries. It suggests that most older adults in a 55+ master planned community are not driven to their selection of a place to live primarily based on opportunities for activity, but that being active is important to them. The way they define activity is eclectic, ranging from an emphasis on physical activity to a more holistic view of how time is used. Most would probably agree that activity is 1) Something of significance, and 2) Something that engages the body or mind.

The third question was, “What activities do older adults living in a 55+ master planned community prefer?” Activity journals collected from participants revealed a wide range of activities done by participants over their two-week recording period. These were organized into 10 categories: 1) Physical, 2) Social, 3) Intellectual, 4) Practical, 5) Employment, 6) Volunteer, 7) Personal Improvement, 8) Passive, 9) Entertainment, and 10) Special Events. Responses to survey items and interview questions indicate that physical, social, intellectual, and practical activity are the types of activity participants engage in most frequently. Many of them also indicate that they enjoy these activities, but also express greater enjoyment for special events and entertainment. In speaking with participants, it was clear that many engaged in regular exercise and enjoyed it. They also consistently expressed a preference for various types of social engagement, whether this meant time spent with family or friends, or structured activities in the community. Few in this affluent community work. Most continued to do the kinds of things they had enjoyed at previous stages of life, with more time to devote to leisure activities.

One participant brought up a philosophical matter that was largely ignored by the residents. “What is a life for?” he asked. He went on,

The average human has about 20,000 days to live . . . What do you do with them? Each minute is like a dollar. How are you doing to spend it? Is it playing golf and playing bridge and going on the next cruise we’re going to go out to dinner and just pleasing the flesh? Is that what life is for?

## CHAPTER V

### DISCUSSION AND CONCLUSIONS

On my last day in the community, August 21, 2021, I did my usual run through the neighborhood. It was a Saturday, so the streets were mostly empty and quiet. My brother, who lives in a neighboring town, stopped by just before I was due to leave for the airport and we walked up the hill to Starbucks. We passed Michele, the participant who was unhappy with Sequoia Heights and planning to move. She was in her front yard talking to a couple. Potential buyers? The woman compliments my glasses and tells me she just bought a similar pair. In an emphasis on my age, perhaps to fit in, I confide that the glasses are my first pair of varifocals. We passed Joan who was tugging her dog Brodie's leash, trying as usual to keep him under control. I waved and she waved back. We stopped for a brief cha, and then my brother and I continued up the steep hill. "You're like the mayor of Sequoia Heights," my brother said, bemused. My father has also commented on how involved I am in the community. "More than some of the people who've been here for years," he said. "You're more involved than I am."

In fact, I have barely scratched the surface of this place. There are so many people I wanted to meet but never had the chance. There is the woman down the street who is very unhappy with the community and makes that fact known. There is the woman who never leaves her house. There are the "garden tour ladies," perfectly dressed, full hair and makeup, smiling politely. There is the man who slammed the brakes of his Porsche, shouting at other drivers at the roundabout. The woman who sees invisible animals and fears them. What does it mean to be old? To be active? To be both of those things, simultaneously? Every person here is both a

partial answer to these questions and a bottomless well of further questions. I wonder how life will progress for the people I have met. What will happen with Mark's mother-in-law? Will Page transition away from caring for her grandson smoothly? Will Debra go back to graduate school? What will Joan do next?

### **Introduction**

I set out on this research project wanting to know how older adults in a 55+ active adult master planned community can participate as co-creators of research, and what activity means at this stage of their lives, including 1) the range of activities they enjoy, 2) how they define “activity” and an “active person,” 3) how important it is to them to be active and to be perceived as active, 4) their views on aging and retirement, 5) why they have chosen to live in a 55+ active adult master planned community, 6) how the community contributes to their activity, 7) how the COVID-19 pandemic has affected their activities, and 8) other barriers to activity. In order to better understand activity for this population, I also sought to understand which activities they prefer. Statements of both the methodological problem and the contextual problem are provided below, along with the research questions and an overview of the study.

### **Statement of the Methodological Problem**

I believe that “as researchers, we should enable the desires of older adults to be heard” (Davidson & Jensen, 2013, p. 43). Older adults are often overlooked professionally, a “waste of talent and experience” that “is incalculable” (Laslett, 1991, p. 5). This does not have to be the case since there are “things which the elderly can do now—and should do if they possibly can—because no one else can do them” (p. 197). One of these things might include helping create a better understanding of active aging. Other researchers, such as Partridge (2022), have achieved good results with older adults as “expert researchers.” However, as Fishleder et al. (2016) observed, “Older adults moving to active planned retirement communities are perhaps a distinct

group” (p. 537). It is possible that their priorities may not include-co-creation of research, or that unique considerations apply in engaging their participation.

### **Statement of the Contextual Problem**

Retirement communities, master-planned age-restricted communities, and community centers provide activities based on their beliefs about what older adults need and want. Because no individual or organization exists outside of the culture in which it is formed, it is likely that activities are chosen as the result of beliefs about what older adults *should* need or want—or, perhaps, what they can be sold (Katz, 2005). Of course, older adults are not a homogenous group (Lowsky et al., 2014), with age stratification being the only thing many of them have in common. Despite their diversity, older adults generally report that they enjoy being “active.” What we did not know was how they define “activity,” what it means to them, or which activities they prefer. During this study, I encouraged older adults to define “activities” and to articulate *why* it is important and *how* important it is. Do older adults, for instance, believe that they must be “active”? To what extent does an active adult community encourage a more active lifestyle?

### **Research Questions**

- Q1     What are methodological considerations when involving residents of a 55+ active adult master planned community as co-creators of research?
- Q2     How do residents of a 55+ active adult master planned community experience “activity”?
- Q3     Which activities do residents of a 55+ active adult master planned community prefer?

### **Overview of the Study**

This was a complicated and long-term project, with my first conversation with a member of the community, simply to test the feasibility of the concept, taking place in September of 2020. Access to a population alone seemed almost insurmountable with the COVID-19

pandemic restrictions still in place and vaccinations not yet on the horizon, not to mention the intense privacy of a community with a policy against soliciting. But with the help of just two people at the start, I made incremental progress. I spent six weeks (five of them consecutive) living in the community as much like a resident as possible. “I am officially an older adult,” I joked after watching both *Matlock* and *The Ed Sullivan Show* in a single evening, wrapped in a crocheted afghan. During this time, I reviewed 14-day activity journals, conducted interviews with 16 official participants and a spouse who sat in on an interview, engaged in activities inside and outside the community with residents, and took part in community activities on my own.

Upon returning home, I immediately reviewed activities in depth, developing a comprehensive list of things participants reported doing and separated these into 8 different categories which I sent to participants for their approval. Based on their responses, I further refined the categories, which resulted in a total of 10. Using the suggested survey questions participants provided, along with questions suggested by conversations we had and observations I made, I created a draft survey for participants to review. A final version became active on October 1, 2021, and interview participants were sent a link, asking them to take the survey themselves and pass the link on to as many Sequoia Heights residents, including friends and neighbors, as possible. This achieved the essential goal of avoiding having me contact residents personally. It also allowed me to evaluate how well this method works in gaining responses, since the survey did not come to recipients from an unknown source but rather from a friend or neighbor. The survey remained open for 34 days. During this time, I regularly reminded the participants to forward the survey link to as many friends and neighbors as possible. I suggested that they emphasize that the survey was created by a team of Sequoia Heights residents. The survey received 57 responses.

In addition to working on developing and disseminating the survey, I also delved into the interview data once I returned home. I had recorded each interview using TapeACall, an easy-to-use cellphone application, and uploaded them for manual transcription to Scribie, which typically provided finished transcripts within 48 hours. On one occasion, the service contacted me to ask for an additional fee since background noise on the tape made it difficult to hear. This was the one interview I conducted in the community clubhouse, and the background noise is a distraction. I listened to all interviews again before reviewing the transcripts, which allowed me to summarize them more effectively. I created summaries for each participant for their review. These included a biographical statement for each participant, along with sections containing both paraphrased and directly quoted material relevant to the research questions. Summaries were sent to participants for their approval. Most resulted in immediate approval. Others asked for minor changes or expressed concerns that they had made statements that might sound negative to their neighbors. One participant responded with more questions about co-creation of research and we had an extended email and telephone conversation that resulted in greater willingness to be involved in co-creation in the future.

### **Data Collection**

Data were collected for the methodological problem through interviews and observation. Each interview, lasting between 35 and 100 minutes, was recorded and transcribed. One of the interview questions was about co-creation of research. The question was phrased conversationally with greater or lesser degrees of context provided, depending on the participant's understanding. Most frequently, I said something like, "There is a popular idea in research right now where people who are not researchers partner with researchers to help them do research. The idea is that people in a community are experts about their own lives and can provide valuable personal and professional insight in designing and conducting research. Does



that sound like something you would like to do?” I used follow-up questions where appropriate, such as asking those who indicated they would like to be involved in research how they saw their skills being utilized. I created summaries of each transcription and selected the portions related to co-creation of research, reporting participant responses. I did not rely only on participants’ responses to the question but also recorded observations about the process of attempting to collaborate with participants as co-creators.

Data collection for the contextual problem included demographic surveys, 14-day activity journals, interviews lasting between 35 and 100 minutes, observations of participation in an activity, answers to survey questions (both closed- and open-ended), and photographs and artifacts. I collected and reviewed activity journals before meeting with participants for interviews so their journals could provide material for specific questions. I also asked other questions that enabled me to create a biographical profile of each participant. Additionally, I wrote summaries of their answers about activity, retirement, aging, how the community contributes to activity, and the impact of COVID-19 restrictions on activity in the community. Participants were given the summaries for their approval or to provide clarification and changes. The approximately 30 hours I spent doing activities with residents or activities recommended by residents were an invaluable part of the study that allowed me to experience “activity” in the context of a 55+ active adult master planned community for myself.

### **Richness of the Data**

I am proud and a little surprised when I survey the vast array of data I collected during my six weeks embedded as an honorary “older adult” in Sequoia Heights. I have activity journals, interview transcripts, field notes, photographs, maps and flyers, club communications, and emails. This is the kind of research I always hoped to achieve: multifaceted and rich with meaning. While there is more than can possibly be included in this dissertation, I have tried to

select a representative sample of quotes, observations, artifacts, and photos, that gives as accurate an impression as possible of what living at Sequoia Heights is like and how members of the community function as co-creators of research and how they experience activity in a place where the activity lifestyle is a particular point of pride. While I found certain common themes across participants, I also observed great variety in individual experiences and opinions. Rather than trying to force data into a specific thematic framework, I have focused primarily on trying to provide a sense of the multiple ways people choose to live their lives. However, I have highlighted themes where they appear and seem to “speak” to a potentially larger issue. I am excited at the potential body of presentations and publications that may arise from my work (listed in Chapter 3 under Findings Presentation). In the following sections, I provide specific insights from my investigation into each of the three research questions.

### **“I Just Want to Play”: Methodological Findings**

The older adults who participated in this study, particularly the interview portion which also required completion of a 14-day activity journal, doing an activity with me, suggesting survey questions for the wider community, reviewing draft surveys, and disseminating surveys, were friendly and open. I sought to better understand how they could be involved in co-creation of research in ways that were helpful to project itself and gratifying for them. I addressed this question through asking them directly and observing how effective attempting co-creation during the study conducted at Sequoia Heights was.

### **Responses About Co-Creation of Research**

Participants were questioned about their feelings about co-creation of research at the end of an interview about activity at Sequoia Heights. A few had positive reactions toward the idea of co-creation of research and largely expressed willingness to help, at least under certain

circumstances, like if the project was especially interesting or their skills were uniquely needed. However, most preferred to keep their participation at a cursory level, often becoming less responsive to requests that required a greater level of engagement with the research. This is not surprising. Many have spent decades working in demanding careers and raising families. The current priority for most is to spend time doing the things they enjoy most. For some, this may include certain forms of work, but most prioritize time with family and friends and participation in favored activities that cover a wide range, including the physical (tennis, walking, yoga, gardening), the intellectual (reading, puzzles, games), and the social (meals with friends, parties, clubs). These do not have to be special or extravagant; many express as much enjoyment in a simple slow morning with the newspaper and a cup of good coffee as an outing to a concert or a weekend get-away.

Most participants reported that there are basically two kinds of people living at Sequoia Heights: those who are very involved with the community and those who are not. Those who are very involved in the community are clearly in the minority, and often feel frustrated by their inability to engage the majority in activities and community governance. This appears to be a microcosm of a problem that is faced in all kinds of communities and at all levels of society. Greater representation is an acknowledged need, but getting it is always a challenge. For instance, one survey item asked to what extent respondents would be interested in leading any activities that are not currently offered in the community. The response indicated that most would not want to be involved in this way.

### **Observations About Co-Creation of Research**

Participants were helpful in the following ways: 1) Gatekeeping, 2) Survey item suggestions, 3) Survey review, and 4) Survey dissemination. However, they also exhibited

behaviors that could be classified as barriers to effective involvement, at least in the context of this study. They can also be more positively constructed as the simple realities of working with this population and considered in research design accordingly. I noted the following preferences and behaviors in participants: 1) Preference for superficial involvement, 2) Preference for talk over other forms of engagement, and 3) Lack of responsiveness.

Participants were unfailingly gracious when we interacted, expressing willingness to help. Their preference for a low level of engagement was clear. They enjoyed sitting down and chatting, but enthusiasm for reviewing transcripts, making suggestions, and helping disseminate the survey were significantly lower than expected. Some balked at the idea of completing a 14-day activity journal, with several withdrawing participation at that point in the study. Still, there were encouraging signs that point to possibilities for mutually satisfying co-creation of research with this population. Many indicated that they would be willing to be involved as co-creators of research if the topic was of particular interest or their skills were specifically needed. Providing interested participants with greater ownership of the project from the beginning would likely result in greater enthusiasm for the possibilities research can create for solving problems. However, others are in a stage of life where engagement with work is not a priority. Providing avenues for scaled-down co-creation of research can utilize these voices.

The primary barrier to co-creation of research in a community like Sequoia Heights is that most people have a clear idea of how they would like to spend their time and are fully involved in a wide range of activities that provide meaning and structure to their lives. They are not likely to see a clear reason for engaging in research, particularly not when they have failed to see practical and positive results in the past. However, it is possible that this barrier could be overcome through sustained conversation and engagement around the concept of co-creation.

### **“Doing Nothing Drives Me Nuts”: Contextual Findings**

The meaning of activity for residents was addressed through 1) Range of activities, 2) Rationale for activity journal inclusion, 3) Definition of “activity” and an “active person,” 4) Importance of being active and being perceived as being active, 5) Views on retirement and aging, 6) Choice of community, 7) Community contribution to activity, 8) Effect of the COVID-19 pandemic on activity, and 9) Other barriers to activity. Discussion concerning each of these areas is addressed as follows:

#### **Range of Activities**

The enormous range of activities participants reported on their 14-day activity journals was impressive. There is a lot going on at Sequoia Heights and most of the people I spoke with seemed content with their activities, especially as COVID-19 pandemic restrictions began to lessen and people started to anticipate a return to “normal.”

#### **Reasons for Activity Journal Inclusion**

As I looked through activity journals, I often noticed inconsistency in the kinds of things that were reported. For instance, a participant might have told me about an exercise class she regularly attended and yet I would notice it did not appear as a journal entry. In general, I was interested in knowing why people chose to label certain actions as “activities” while not making note of others. In some cases, journals were completed hastily with little attempt at detail, which is understandable for busy people. But when I asked questions about why something qualified as an activity, I received interesting responses. Some had recorded only physical activities, with one confiding that she thought that was what I would be interested in. Others indicated that time was the important factor. The attempts to explain how items “made the cut” for activity journal inclusion were helpful in opening discussion about how activity is defined.

### **Definition of “Activity” and an “Active Person”**

There was a wide range of responses to the questions, “What is activity?” and “What is an active person?” Although responses were varied, they did converge toward a central theme. “Activity” is a significant expenditure of time and energy on something noteworthy. This is often physical, such as taking a walk or going to the gym, but it can also be social and intellectual. It can be routine, like reading the newspaper, or special, like attending a party. Activity is important because it provides structure, continuity, meaning, and identity for people. It alleviates boredom. It creates purpose. An “active person” is somewhat harder to define, and the definition changes depending on stage of life and abilities. While some participants were adamant that an “active person” was one who is physically active, most acknowledged the definition is broader than that and generally refers to someone who can be said to be “engaged.” Being an “active person” is a source of pride for many older adults because it means they can still be independent and enjoy life on their own terms. Active people in Sequoia Heights appear to be more admired than inactive ones; I heard many stories about reclusive individuals that were not painted in flattering terms.

### **Importance of Being and Appearing “Active”**

I used dramaturgical theory, which focuses on individuals as “actors” performing on a stage (e.g., Goffman), and attempting to create an image of themselves both to themselves and to others. This is often an unconscious action (Jones, 1969, as cited in Bolino et al., 2016) and does not imply dishonesty, since a person can be actively trying to create an impression that is accurate (Leary & Kowalski, 1990). It seemed likely that older adults, as a potentially stigmatized group subject to ageism, might have reason to attempt to manage the impression they give, particularly in terms of their “successful” and “active” aging. I collected data in two ways:

1) through a direct question which asked, “To what extent is it important for you to be perceived by others as an ‘active person?’ Why?” and 2) through observation. While a minority indicated that they did care about how others perceived them and wanted to be seen as active, (e.g., “I guess I do like others to see that I have it together”) most reacted strongly, with statements like, “I don’t care what others think about me,” and “I don’t know that others even care if I’m active.”)

But of course, one could argue that cultivating an attitude of disregard for others’ opinions is a form of impression management. Observation and interaction with participants indicated that some were concerned with how they appeared, particularly to me. It was not uncommon for participants to remark that I would think they were “really boring” or that I would think they “don’t do much of anything.” It was not unusual for participants to state that they hadn’t included certain activities in their 14-day activity journals because they did not think I would be interested in those activities. It is interesting to note that all the participants who expressed concern with how their activities might be perceived by me were women. Not a single man made a similar statement. This seems to confirm research by Smith et al. (2013) indicating that women accomplish impression management through conforming to behavioral expectations. Among these is acting communally, which appears to be what women are doing when they attempt to gain approval, even from a relative stranger.

### **Retirement, Aging, and Choice of an Age-Restricted Community**

While a few of those I interviewed were highly knowledgeable about what they called “age qualified” communities, having researched them at length and having given considerable thought to the kind of retirement they would like to have, this was not common. Most people interviewed had given minimal thought to retirement over the years, being too busy getting

through life to consider it. They moved to Sequoia Heights primarily because they found a house in the community that suited their needs or provided easy access to their adult children and grandchildren. However, even though the primary reason for living in the community does not appear to be the “active adult” lifestyle, most appreciate access to the facilities, including the clubhouse and trails.

While much attention has been paid to the ageism experienced by older adults (e.g., Katz, 2019), with the topic receiving new attention in the wake of the COVID-19 pandemic in which ageist attitudes were rampant (Arcieri, 2021), and studies address age bias against younger people in general (e.g. Raymer et al., 2017), there has been little attention to the attitudes toward children and younger people of older adults living in 55+ active adult master planned communities. Despite the “positivity effect” in which people develop a stronger bias toward positive information as they age (Carstensen & DeLiema, 2018), many of the older adults I interacted with in Sequoia Heights made statements indicating a preference for living in proximity to people their own age and specifically away from children, teenagers, and young families. Participants were quick to insist that they *liked* children, they just didn’t want to live near them, citing noise, mess, bikes, and general chaos. “That’s not the stage of life we’re at,” one said, in a statement that seemed to apply broadly. I was even startled to see my own advancing age used as a positive argument for allowing me to attend a community board meeting. In an email to the board chairman, I was copied on, the participant wrote to ask that I be allowed to attend. He closed with the following statement, “I want to add: The ‘student’ is not a youngster. She is just a little younger than our children” (Personal Communication, June 29, 2021).



Several interview participants emphasized the importance of having neighbors who were in a similar life stage, with time to do things that people in other age groups, still working and raising kids, rarely have the time to do. They also appreciated having things in common with their neighbors, who would often relate to health struggles and other issues of older age to a greater degree than younger people could. Many continue to enjoy younger family members, and several were primary caregivers for grandchildren.

### **Community Contribution to Activity**

Even those who had not moved to Sequoia Heights specifically for the activities or amenities were often interested in using these benefits. There is little doubt that access to the trails and facilities provide residents with chances to try things they would not have tried otherwise. Participants reported making use of free classes at the fitness center and joining clubs and groups that allowed them to meet new people and have new experiences.

There was a subgroup of people for whom involvement specifically with the community association and its events and priorities was what earned an individual the designation of “active person.” In this way of thinking, a person who takes long daily walks, plays golf with an adult son, takes care of grandchildren, does contract projects, attends church, goes on weekend sailing and hiking trips, would not be considered an “active person” in Sequoia Heights because they engage in these activities independently, without reference to the community. This strikes me as an overly narrow definition, but it does point to the different goals and priorities people have when transitioning to a community like this. For those for whom involvement in the community is very important, the lack of engagement of the quiet majority reduces potential social network and can result in the cancellation of activities they would like to do. Those for whom a 55+

active adults master planned community is simply a nice one-level house that does not require landscaping might feel pressured to engage more with the community than they would like.

### **Effect of the COVID-19 Pandemic on Activity**

While the COVID-19 pandemic caused changes in the ways most older adults at Sequoia Heights experienced activity, these were mitigated to some extent by access to the golf course and trails, both of which provided outdoor recreation, and innovative social activities, such as Happy Hours conducted in garages or on outdoor patios. Several participants also found the Zoom exercise classes beneficial and took online courses to occupy their attention. Some even indicated that activity had not changed a great deal for them during the period of lockdown. Many of those who had developed new routines when the fitness center and swimming pool became unavailable reported that they were happy with their new activities and not sure they would rush back. The innovation and resilience are impressive, but the experience of those at Sequoia Heights underscores the importance of a range of options, including open spaces, that allow older adults to continue to be active in varying circumstances.

### **Other Impediments to Activity**

It is difficult to overemphasize the importance of physical health to the ability to remain active, whether physically, socially, or intellectually, as one ages. Residents at Sequoia Heights, especially those on the older age of the age spectrum, are keenly aware of the knife-edge on which their lives teeter. During the study itself, several participants had injuries and illnesses that stopped them from engaging in their normal activities. One participant suffered the loss of a spouse. Several potential participants withdrew from the study, citing illnesses or injuries. Ambulances were frequently seen on the streets, often parked regularly in front of the same

houses. In other communities, lack of financial resources might be a primary impediment to activity, but in Sequoia Heights physical health is a primary driver.

### **Preferred Activities**

The final research question looked at which activities are preferred by older adults in a 55+ active adult master planned community. The question was addressed through ranking on two survey items, asking which activities participants did most often and which they preferred and through interviews focusing on what they report liking to do best, including what they would do on an “ideal” day. There was little difference between what they did most often and what they preferred, with most older adults appearing to prefer physical activity most, followed by social, intellectual, and practical activity. They often seem to take great enjoyment from regular routine activities that are pleasant—sleeping in, reading the newspaper, taking a walk, going to the gym or to the pickleball courts, working in the garden, accomplishing household tasks. They also enjoy the opportunity to take part in occasional special events, like travel.

One research participant summed up what older adults want by saying, “options.” Those who participated in interviews and the survey indicated that they like to do all kinds of things. Physical activities are often preferred, perhaps because they signal health and vitality, but residents also enjoy socializing with friends, challenging their minds, doing routine chores around the house, spending time with family members, and going for short or extended trips. Much of what they do is contingent on health and ability, but most show remarkable resilience, quickly adjusting to changing circumstances. When one participant developed problems with his eyesight that resulted in falls from his bicycle outdoors, he shifted to a stationary bike that he keeps in his garage.

### **Where to Go from Here? Next Steps**

As in most co-created studies involving older adults, the older adults played a less central role than I would have ideally liked. They did not, for instance, determine the research questions or the methods used. They did not interview other members of the community, listen to recordings, read raw transcripts, or do any reporting. They did serve as gatekeepers, suggest survey question ideas, reviewing survey drafts and summarize interviews, and disseminate the survey to other members of the community. In a future research study, I would like to ask those participants who were most open to co-creation of research to form a small “research club,” advertising to the community for additional members. I would like to see this group brainstorm how research might be genuinely helpful to the community and to settle on a topic themselves. They would then determine how best to investigate that topic and how to present it to relevant stakeholders. In this scenario, I would relegate my role to that of consultant, remaining in the background but available as a sounding board or for practical or technological assistance.

While I am not certain that having greater ownership of a research project would result in more engaged participation, I am also not certain that my role as “the researcher,” working on a dissertation and making all the decisions did not result in less engagement than might occur if the older adults themselves took a more prominent role. Both gatekeepers did take on a certain degree of ownership, with Gatekeeper 1 carefully selecting potential participants and making decisions about how to approach them that might result in the best outcome. Gatekeeper 2 also took initiative in contacting the administration of Sequoia Heights in an attempt to get the survey disseminated through official channels. When that failed, she took the step of posting it on a listserv used by members of the community, resulting in many additional completed surveys.

### **Recommendations for Co-Creating Research With Residents of a 55+ Active Adult Master Planned Community**

The following recommendations for co-creation of research with older adults living in a 55+ active adult master planned community have arisen from my conversations and observations working with this population on an extended research project. They draw both on aspects of this study that went well and those that brought challenges. Although such a project almost certainly has to begin with involvement from an official “researcher,” the aim would be to move as quickly as possible toward independence and ownership by other co-creators.

#### **Careful Recruiting**

It is important to recruit individuals as co-creators who are willing to be involved in a project long-term and who are enthusiastic about the potential of co-creation. Recruitment could include an assessment of interest and skills so those involved feel their skills are adequately used.

#### **Clear Expectations**

Expectations for how much time will be involved in the research and what kinds of things co-creators might be expected to do should be made clear from the beginning. This would be a good time to discuss how much time a co-creator might be expected to invest and other similar logistical concerns. These could be established by group consensus.

#### **Education About Co-Creation**

Resources and studies pointing to the benefits of co-creation could be used as a motivational and inspirational tool, helping potential co-creators see how this kind of research can be done and how it can make a positive difference in communities.

**Regular Communication**

Establish a protocol for communication that works for all involved, whether this requires regular face-to-face meetings or can be accomplished through technology. Regular communication will help maintain momentum throughout the project.

**Social Atmosphere**

If possible, help to create a social atmosphere in the group so the research feels less like work and provides rewards in the form of friendships and collaborative success. This could mean having some meetings take place during nature walks on trails or picnics.

**Share Results**

Make sure to share results of any co-created research projects with other community members and the administration to build further enthusiasm for co-creation of research in the community. Social media, local newspapers, and presentations at high schools and community colleges are also possible ways share results.

**Suggestions for Further Research**

Given the level of unfamiliarity with co-creation of research exhibited by older adults living in at 55+ active adult master planned community, there is clearly room for additional studies. Suggestions include:

1. Experimenting with greater ownership of research by older adults.
2. Investigations of community organizations already in existence.
3. Case studies about specific clubs/groups.
4. Investigations of visual/virtual methods
5. Teaching interviewing to older adults.

## Conclusion

In October 2021, while still awaiting survey responses, I received an email from Dave. I had sent him a four-page summary of the concept of co-creation of research with older adults. He wanted to discuss it a bit more, so we spoke on the telephone. He recommended a New York Times article on cooperative housing called, “Does Co-Housing Provide a Path to Happiness for Modern Parents?” He wrote:

It caused me to reflect that several aspects of [Sequoia Heights] are in the mode of cooperative housing. Similar communities such as SaddleBrooke in Arizona have [Sequoia Heights] type amenities plus many more such as wood shops, sewing centers, common tool supplies, machine shops, gift shops, libraries. Each common amenity bringing those type of communities closer to being cooperative housing. While I would never describe [Sequoia Heights] as cooperative housing, it is considerably closer to that concept than my former house in the suburbs.

He closed that portion of the email with a surprising offer, given his early dismissal of the concept of co-creation of research. “If you decide to do a further project, call me,” he said. Dave went on to describe a near-perfect day he recently experienced:

Today was one of those near perfect days that you once asked about. I was able to spend four hours with the newspapers and coffee. Ahhh, such a luxury. One cost was I told [my granddaughter] last night that she could not spend the day with us today because I had too much to do today. I was also able to take a walk in the swirling wind. Rake leaves away from the storm drain. Called [my daughter] to assure her that her family was welcome to come here if the power went out at their house (as it sometimes does). Reschedule tomorrow’s book group because one of our five members is in the hospital. (We will be discussing *Stoner* by John Williams). Work thru the election ballot with Karen. Think about dinner. And I plan to watch another episode of *The Crown* tonight if the electric power stays on. Cliff Maas reports that the offshore barometric pressure is now below 27 inches—the lowest on record in the PNW.

Both Dave’s softening stance toward co-creation of research and his continued reflection on what it means to have an “ideal day” were encouraging. The interactions and conversations we had over the course of this project changed us both. I became a better researcher through completing this project. Participation in this research project also enabled participants, like Dave, to consider new ideas and ask themselves questions they had not previously considered.

“Research,” according to Charles F. Kettering, a prolific inventor, “means that you don’t know but are willing to find out.” Openness to new ideas, the ability to change and grow, these continue all through life, for people who allow them to do so.

Paul, a former World War II refugee who was born in Lithuania and spent several years at a misplaced persons camp in Australia, mused that, “I think we stumbled into a very good life.” This provides a nice acknowledgement of the often random nature of life. We make choices, yes, but we are often subject to the whims of fate. Paul may have stumbled into a good life, like many people do, but he has also created a good life and will continue to define what that means through the things he does and the person he is forever becoming. As will we all.



## REFERENCES

- Abma, T. A., & Stake, R. E. (2014). Science of the particular: An advocacy of naturalistic case study in health research. *Qualitative Health Research, 24*(8), 1150–1161.
- Achat, H., Kawachi, I., Spiro, A., III, DeMolles, D. A., & Sparrow, D. (2000). Optimism and depression as predictors of physical and mental health functioning: The normative aging study. *Annals of Behavioral Medicine, 22*, 127–130.
- Achenbaum, W. A. (2015). A history of ageism since 1969. *Generations, 39*(3), 10–16.
- Agahi, N., Ahacic, K., & Parker, M. G. (2006). Continuity of leisure participation from middle age to old age. *The Journals of Gerontology, Series B: Psychological Sciences and Social Sciences, 61B*, S340–S346.
- Aguilera-Hermida, A. P., Anderson, E. A., & Negrón, V. A. (2020). Intergenerational activities that promote engaging conversations are preferred among young and older adults. *Journal of Intergenerational Relationships, 18*(1), 71–87.
- Ahn, M., Kang, J., & Kwon, H. J. (2020). The concept of aging in place as intention. *The Gerontologist, 60*(1), 50–59.
- Ahn, M., Kwon, H. J., & Kang, J. (2020). Supporting aging-in-place well: Findings from a cluster analysis of the reasons for aging-in-place and perceptions of well-being. *Journal of Applied Gerontology, 39*(1), 3–15.
- Allan, B. A., & Duffy, R. D. (2014). Calling, goals, and life satisfaction: A moderated mediation model. *Journal of Career Assessment, 22*, 451–464.

- Allwood, C. M. (2012). The distinction between qualitative and quantitative research methods is problematic. *Quality & Quantity*, 46(5), 1417–1429.
- Alwin, D. F. (2010). How good is survey measurement? Assessing the reliability and validity of survey measures. In P. V. Marsden & J. D. Wright (Eds.), *Handbook of survey research* (pp. 405–434). Emerald Group Publishing, Ltd.
- Amano, T., Park, S., & Morrow-Howell, N. (2018). The association between cognitive impairment and patterns of activity engagement among older adults. *Research on Aging*, 40(7), 645–667.
- Andrews, G. J., Cutchin, M., McCracken, K., Phillips, D. R., & Wiles, J. L. (2007). Geographical gerontology: The constitution of a discipline. *Social Science & Medicine*, 65, 151–168.
- Andrews, M. (1999). The seductiveness of agelessness. *Aging and Society*, 19(3), 301–318.
- Andrews, T. (2012). What is social constructionism? *Grounded Theory Review*, 11(1).
- Appau, S., Awaworyi Churchill, S., & Farrell, L. (2020). Wellbeing among older people: An introduction. In S. Awaworyi Churchill, L. Farrell, & S. Appau (Eds.), *Measuring, understanding and improving wellbeing among older people*. (pp. 1–13). Palgrave Macmillan.
- Applewhite, A. (2016). *This chair rocks: A manifesto against ageism*. Thorndike Press, A part of Gale, Cengage Learning.
- Arcieri, A. A. (2021). The relationships between COVID-19 anxiety, ageism, and ableism. *Psychological Reports*, 00332941211018404.
- Ashforth, B. E., & Humphrey, R. H. (1997). The ubiquity and potency of labeling organizations. *Organization Science*, 8(1), 43–58.

- Atchley, R. C. (1999). *Continuity and adaptation in aging: Creating positive experiences*. Johns Hopkins University Press.
- Ausubel, J. (2020, March 10). Older people are more likely to live alone in the U.S. than elsewhere in the world. *Fact Tank*. Pew Research Center. <https://www.pewresearch.org/fact-tank/2020/03/10/older-people-are-more-likely-to-live-alone-in-the-u-s-than-elsewhere-in-the-world/>
- Baker, L. A., Cahalin, L. P., Gerst, K., & Burr, J. A. (2005). Productive activities and subjective well-being among older adults: The influence of number of activities and time commitment. *Social Indicators Research*, 73(3), 431-458.
- Banaji, M. R., & Hardin, C. D. (1996). Automatic stereotyping. *Psychological Science*, 7(3), 136-141.
- Battersby, L., Fang, M. L., Canham, S. L., Sixsmith, J., Moreno, S., & Sixsmith, A. (2017). Co-creation methods: Informing technology solutions for older adults. *Human aspects of IT for the aged population. aging, design and user experience* (pp. 77-89). Springer International Publishing.
- Bauger, L., & Bongaardt, R. (2016). The lived experience of well-being in retirement: A phenomenological study. *International Journal of Qualitative Studies on Health and Well-Being*, 11(1).
- Becker, W. E. (2001). Trends. In D.R. Suchman (Ed.), *Developing active adult retirement communities* (pp. 291-299). The Urban Land Institute (ULI).
- Beehr, T. A., & Nielson, N. L. (1995). Descriptions of job activities and retirement activities during the transition to retirement. *Journal of Organizational Behavior*, 16, 681-690.

- Benford, R. D., & Hare, A. P. (2015). Dramaturgical analysis. In James D. Wright (Ed.), *International encyclopedia of the social & behavioral sciences* (2nd edition, Vol. 6, pp. 646–650). Elsevier.
- Berger, P., & Luckmann, T. (1991). *The social construction of reality*. Penguin Books.
- Berger, R. (2017). Aging in America: Ageism and general attitudes toward growing old and the elderly. *Open Journal of Social Sciences*, 5(08), 183.
- Bernard, M., Bartlam, B., Biggs, S., & Sim, J. (2004). *New lifestyles in old age: Health, identity and well-being in Berryhill Retirement Village*. The Policy Press.
- Bernard, M., Liddle, J., Bartlam, B., Scharf, T., & Sim, J. (2012). Then and now: Evolving community in the context of a retirement village. *Aging & Society*, 32(1), 103–129.
- Bernstein, D., Ottenfeld, M., & Witte, C. (2011). Active adult communities: A development of hypotheses regarding consumer attitudes and preferences. *Academy of Marketing Studies Journal*, 15(2), 151–164.
- Biddle, B. J. (1986). Recent developments in role theory. *Annual Review of Sociology*, 12, 67–92.
- Biggs, S. (2004). Age, gender, narratives, and masquerades. *Journal of Aging Studies*, 18(1), 45–58.
- Blaikie, A. (1999). *Aging and popular culture*. Cambridge University Press.
- Blair, E. (2015). A reflexive exploration of two qualitative data coding techniques. *Journal of Methods and Measurement in the Social Sciences*, 6(1), 14–29.
- Blair, T., & Minkler, M. (2009). Participatory action research with older adults: Key principles in practice. *The Gerontologist*, 49(5), 651–662.

- Blanchard, J. (2013). Aging in community: Communitarian alternative to aging in place, alone. *Generations*, 37(4), 6-13.
- Blanton, H., & Christie, C. (2003). Deviance regulation: A theory of action and identity. *Review of General Psychology*, 7(2), 115–149.
- Blechman, A. D. (2009). *Leisureville: Adventures in a world without children*. Grove/Atlantic, Inc.
- Blumer, H. (1969). *Symbolic interactionism: Perspective and method*. Prentiss-Hall.
- Bodner, E. (2009). On the origins of ageism among older and younger adults. *International Psychogeriatrics*, 21(6), 1003.
- Bolino, M., Long, D., & Turnley, W. (2016). Impression management in organizations: Critical questions, answers, and areas for future research. *Annual Review of Organizational Psychology and Organizational Behavior*, 3(1), 377-406.
- Booker, C. (2004). *The seven basic plots: Why we tell stories*. Continuum.
- Boudiny, K. (2013). Active aging: From empty rhetoric to effective policy tool. *Aging & Society*, 33, 1077–1098.
- Bowler, K. (2018). *Everything happens for a reason: And other lies I've loved*. Random House.
- Boylan, A. M., Locock, L., Thomson, R., & Staniszewska, S. (2019). “About sixty per cent I want to do it”: Health researchers’ attitudes to, and experiences of, patient and public involvement (PPI)—A qualitative interview study. *Health Expectations*, 22(4), 721-730.
- Bracken, C. (2017). Nobody speaks. Everything signifies. *Qui Parle: Critical Humanities and Social Sciences*, 26(2), 357-360.

- Brandsen, T., Steen, T., & Verschuere, B. (2018). Co-creation and co-production in public services: Urgent issues in practice and research. In *Co-production and co-creation* (pp. 3-8). Routledge.
- Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative Research in Psychology, 3*(2), 77-101.
- Brissett, D., & Edgley, C. (Eds.). (1990). *Life as theater: A dramaturgical sourcebook* (2nd ed.). Aldine de Gruyter.
- Buffel, T. (2019). Older coresearchers exploring age-friendly communities: An “insider” perspective on the benefits and challenges of peer-research. *The Gerontologist, 59*(3), 538-548.
- Burr, J. A., Mutchler, J. E., & Caro, F. G. (2007). Productive activity clusters among middle-aged and older adults: Intersecting forms and time commitments. *The Journals of Gerontology. Series B, Psychological Sciences and Social Sciences, 62*, S267–S275.
- Bytheway, B. (2000). Youthfulness and agelessness: A comment. *Ageing & Society, 20*(6), 781-789.
- Calasanti, T., & King, N. (2020). Beyond successful aging 2.0: Inequalities, ageism, and the case for normalizing old ages. *The Journals of Gerontology: Series B*.
- Calasanti, T., & Repetti, M. (2018). Swiss retirees as “active agers”: A critical look at this new social role. *Journal of Population Aging, 11*, 23-41.
- Callow, D. D., Arnold-Nedimala, N. A., Jordan, L. S., Pena, G. S., Won, J., Woodard, J. L., & Smith, J. C. (2020). The mental health benefits of physical activity in older adults survive the COVID-19 pandemic. *The American Journal of Geriatric Psychiatry, 28*(10), 1046-1057.

- Candela, A. G. (2019). Exploring the function of member checking. *The Qualitative Report, 24*(3), 619-628.
- Carbon Valley Parks and Recreation. (n.d.). <https://www.cvprd.com/2158/Active-Adults>
- Carlson, S. A., Fulton, J. E., Schoenborn, C. E., & Loustalot, F. (2010). Trend and prevalence estimates based on the 2008 physical activity guidelines for Americans. *American Journal of Preventive Medicine, 39* (4), 305–313.
- Carstensen, L. L., & DeLiema, M. (2018). The positivity effect: A negativity bias in youth fades with age. *Current Opinion in Behavioral Sciences, 19*, 7-12.
- Carver, L. F., Beamish, R., Phillips, S. P., & Villeneuve, M. (2018). A scoping review: Social participation as a cornerstone of successful aging in place among rural older adults. *Geriatrics, 3*(4), 75.
- Cecilian, K. (2001). Marketing. In D.R. Suchman (Ed.), *Developing active adult retirement communities* (pp. 119-137). The Urban Land Institute (ULI).
- Center for Disease Control and Prevention. (2013). Healthy places terminology: Aging in place.
- Chang, E. S., Kanno, S., Levy, S., Wang, S. Y., Lee, J. E., & Levy, B. R. (2020). Global reach of ageism on older persons' health: A systematic review. *PloS One, 15*(1), e0220857.
- Chang, P. J., Wray, L., & Lin, Y. (2014). Social relationships, leisure activity, and health in older adults. *Health Psychology, 33*(6), 516.
- Charmaz, K. (2011). Grounded theory method in social justice research. In Norman K. Denzin & Yvonna S. Lincoln (Eds.), *Strategies of qualitative inquiry* (4<sup>th</sup> ed.) (pp. 369–382). Sage.
- Cho, J., & Trent, A. (2006). Validity in qualitative research revisited. *Qualitative Research, 6*(3), 319-340.

- Chopik, W. J., & Giasson, H. L. (2017). Age differences in explicit and implicit age attitudes across the life span. *The Gerontologist*, 57(Suppl. 2), S169–S177.
- Christmas, C., & Anderson, R. A. (2000). Exercise and older patients: Guidelines for the clinician. *Journal of the American Geriatric Society*, 48, 318–324.
- Cizek, G. J., Rosenberg, S. L., & Koons, H. H. (2008). Sources of validity evidence for educational and psychological tests. *Educational and Psychological Measurement*, 68(3), 397–412.
- Clarke, A., & Warren, L. (2007). Hopes, fears and expectations about the future: what do older people's stories tell us about active ageing?. *Ageing & Society*, 27(4), 465-488.
- Codó, E. (2008). Interviews and questionnaires. *The Blackwell guide to research methods in bilingualism and multilingualism*, 158-176.
- Coleman, P. G., & O'Hanlon, A. (2017). *Aging and development: Social and emotional perspectives* (2<sup>nd</sup> ed.). Taylor & Francis.
- Collins, C. S., & Stockton, C. M. (2018). The central role of theory in qualitative research. *International Journal of Qualitative Methods*.
- Corbin, J., & Strauss, A. (1990). Grounded theory research: Procedures, canons, and evaluative criteria. *Qualitative Sociology*, 13(1), 3–21.
- Corrado, A. M., Benjamin-Thomas, T. E., McGrath, C., Hand, C., & Laliberte Rudman, D. (2020). Participatory action research with older adults: a critical interpretive synthesis. *The Gerontologist*, 60(5), e413-e427.
- Cosco, T., Prina, A., Perales, J., Stephen, B., & Brayne, C. (2014). Operational definitions of successful aging: A systematic review. *International Psychogeriatrics*, 26(3), 373–81.
- Crabtree, B. F., & Miller, W. L. (1999). *Doing qualitative research*. Sage.



- Creswell, J. W. (2013). *Qualitative inquiry & research design: Choosing among five approaches* (3rd ed.). Sage.
- Croezen, S., Haveman-Nies, A., Alvarado, V. J., Veer, P. V., & De Groot, C. P. G. M. (2009). Characterization of different groups of elderly according to social engagement activity patterns. *Journal of Nutrition, Health and Aging, 13*, 776–781.
- Cronbach, L. J. (1971). Test validation. In R. L. Thorndik (Ed.), *Educational measurement* (p. 43-507). Allyn & Bacon.
- Crotty, M. J. (1998). *The foundations of social research*. Sage.
- Croucher, K. (2006). *Making the case for retirement villages*. Joseph Rowntree Foundation.
- Crowley, J. E. (2015). Unpacking the power of the mommy wars. *Sociological Inquiry, 85*(2), 217–238.
- Cruikshank, M. (2009). *Learning to be old*. (2<sup>nd</sup> ed.). Rowman & Littlefield Publishers, Inc.
- Cutcliffe, J. R., & McKenna, H. P. (2004). Expert qualitative researchers and the use of audit trails. *Journal of Advanced Nursing, 45*(2), 126–133.
- Dahlin-Ivanoff, S., Sterner, T. R., Blennow, K., Skoog, I., & Erhag, H. F. (2019). Was it worth it? Older adults' experiences of participating in a population-based cohort study—a focus group study. *BMC Geriatrics, 19*(224).
- Damiot, A., Pinto, A. J., Turner, J. E., & Gualano, B. (2020). Immunological implications of physical inactivity among older adults during the COVID-19 pandemic. *Gerontology, 66*(5), 431-438.
- D'Angiulli, A., & Smith LeBeau, L. (2002). On boredom and experimentation in humans. *Ethics & Behavior, 12*(2), 167–176.

- Dannefer, D. (1987). Aging as intracohort differentiation: Accentuation, the Matthew effect, and the life course. *Sociological Forum*, 2, 211–236.
- Dannefer, D. (2003). Cumulative advantage/disadvantage and the life course: Cross-fertilizing age and social science theory. *Journal of Gerontology*, 58B(6), S327–S337.
- Darlaston-Jones, D. (2007). Making connections: The relationship between epistemology and research methods. *Australian Community Psychologist*, 19(1).
- Davey, J., Nana, G., de Joux, V., & Arcus, M. (2004). *Accommodation options for older people in Aotearoa/New Zealand*. Wellington, New Zealand: NZ Institute for Research on Ageing/Business & Economic Research Ltd, for Centre for Housing Research Aotearoa/New Zealand.
- Davidson, J. L., & Jensen, C. (2013). What health topics older adults want to track: A participatory design study. *Proceedings of the 15th International ACM SIGACCESS Conference on Computers and Accessibility*. ACM.
- Day, R., & Hitchings, R. (2011). “Only old ladies would do that”: Age stigma and older people’s strategies for dealing with winter cold. *Health & Place*, 17(4), 885–894.
- de Jong, M. D., Neulen, S., & Jansma, S. R. (2019). Citizens’ intentions to participate in governmental co-creation initiatives: Comparing three co-creation configurations. *Government Information Quarterly*, 36(3), 490-500.
- De Medeiros, K. (2016). Narrative gerontology: Countering the master narratives of aging. *Narrative Works*, 6(1), 63-81.
- Denzin, N. K. (1989). *The research act: A theoretical introduction to sociological methods*. Pearson.

- Depp, C., & Jeste, D. (2006). Definitions and predictors of successful aging: A comprehensive review of larger quantitative studies. *American Journal of Geriatric Psychiatry*, 14, 6–20.
- Desmond, M. (2016). *Evicted. Poverty and profit in the American city*. Crown Books.
- Desrosiers, J., Robichaud, L., Demers, L., G elinas, I., Noreau, L., & Durand, D. (2009). Comparison and correlates of participation in older adults without disabilities. *Archives of Gerontology and Geriatrics*, 49(3), 397-403.
- Devotta, K., Woodhall-Melnik, J., Pedersen, C., Wendaferew, A., Dowbor, T. P., Guilcher, S. J. T., Hamilton-Wright, S., Ferentzy, P., & Hwang, S. W. (2016). Enriching qualitative research by engaging peer interviewers: A case study. *Qualitative Research*, 16, 661–680.
- Dickson, G., & Green, K. L. (2001). Participatory action research: Lessons learned with Aboriginal grandmothers, *Health Care for Women International*, 22, 471–482).
- Dionigi, R. (2002). Leisure and identity management in later life: Understanding competitive sport participation among older adults. *World Leisure Journal*, 44(3), 4–5.
- Dionigi, R. (2015). Pathways to masters sport: Sharing stories from sport “continuers,” “rekindlers” and “late bloomers.” In: E. Tulle and C. Phoenix (Eds.), *Physical activity and sport in later life*, (pp. 54–68). Palgrave Macmillan.
- Dorant, E. (2020). Participatory action research: Why sharing power is needed to improve public health research. *European Journal of Public Health*, 30 (Supplement\_5), 165–138.
- Doshi, J. A., Cen, L., & Polsky, D. (2008). Depression and retirement in late middle-aged U.S. workers. *Health Services Research*, 43, 693–713.
- Dosman, D., Fast, J., Chapman, S. A., & Keating, N. (2006). Retirement and productive activity in later life. *Journal of Family and Economic Issues*, 27(3), 401–419.

- Doyle, M., & Timonen, V. (2009). Lessons from a community-based participatory research project: Older people's and researchers' reflections. *Research on Aging* 32(2): 244–263.
- Doyle, S. (2007). Member checking with older women: A framework for negotiating meaning. *Health Care for Women International*, 8, 888–908.
- Duffy, R. D., Torrey, C. L., England, J., & Tebbe, E. A. (2017). Calling in retirement: A mixed methods study. *The Journal of Positive Psychology*, 12(4), 399–413.
- Dumas, A., Laberge, S., & Straka, S. (2005). Older women's relations to bodily appearance: The embodiment of social and biological conditions of existence. *Ageing & Society*, 25, 883–902.
- Edgley, C. (2013). Introduction. In Edgley, C. (Ed.), *The drama of social life: A dramaturgical handbook*. (pp. 1–12). Ashgate.
- Ekerdt, D. J. (1986). The busy ethic: Moral continuity between work and retirement. *The Gerontologist*, 26(3), 239–244.
- Emler, C. A., & Moceri, J. T. (2012). The importance of social connectedness in building age-friendly communities. *Journal of Aging Research*, 2012.
- Enßle, F., & Helbrecht, I. (2021). Understanding diversity in later life through images of old age. *Ageing & Society*, 41(10), 2396–2415.
- Epstein, M., & Klyukanov, I. (2009). The interesting. *Qui Parle*, 18(1), 75–88.
- Erikson, E. (1963). *Childhood and society*. Norton.
- Erickson, F. (1986). Qualitative methods in research on teaching. In M. C. Wittrock (Ed.), *Handbook of research on teaching* (3<sup>rd</sup> ed., pp.119–161). Macmillan.
- Estes, C. L. (2019). *Aging AZ: Concepts toward emancipatory gerontology*. Routledge.
- Estes, C. L. (2001). *Social policy and aging: A critical perspective*. Sage.

- Etzioni, A. (2000). Creating good communities and good societies. *Contemporary Sociology*, 29(1), 188-195.
- Evans, S. (2009). “That lot up there and us down here”: Social interaction and a sense of community in a mixed tenure UK retirement village. *Ageing & Society*, 29, 2, 199–216.
- Fänge, A. M., Oswald, F., & Clemson, L. (2012). Aging in place in late life: Theory, methodology, and intervention. *Journal of Aging Research*, 2012.
- Farrell, J. (2020). *Billionaire wilderness*. Princeton University Press.
- Feldman, D. C., & Beehr, T.A. (2011). A three-phase model of retirement decision-making. *American Psychologist*, 66, 193–203.
- Feldman, S., Radermacher, H., Browning, C., Bird, S., & Thomas, S. (2008). Challenges of recruitment and retention of older people from culturally diverse communities in research. *Ageing & Society*, 28(4), 473-493.
- Fernández-Mayoralas, G., Rojo- Pérez, F., Martínez- Martín, P., Prieto-Flores, M.-E., Rodríguez- Blázquez, C., Martín-García, S., Rojo-Abuín, J.-M., & Forjaz, M.-J. (2015). Active aging and quality of life: Factors associated with participation in leisure activities among institutionalized older adults, with and without dementia. *Aging & Mental Health*, 19, 1–11. í
- Fisher, G. G., Chaffee, D.S. and Sonnega, A. (2016). Retirement timing: A review and recommendations for future research. *Work, Aging and Retirement*, 2(2), pp.230-261.
- Fishleder, S., Schonfeld, L., Corvin, J., Tyler, S., & VandeWeerd, C. (2016). Drinking behavior among older adults in a planned retirement community: Results from the villages survey. *International Journal of Geriatric Psychiatry*, 31(5), 536–543. doi:10.1002/gps.4359

- Fiske, S. T. (1993). Controlling other people: The impact of power on stereotyping. *American Psychologist*, 48(6), 621.
- Flexner, A. (1939). The usefulness of useless knowledge. *Harper's Magazine*, 179, 544–552.
- Flyvbjerg, B. (2011). Case study. In Norman K. Denzin and Yvonna S. Lincoln (Eds.) *The Sage handbook of qualitative research*, (4th ed.). (pp. 301–316). Sage.
- Forster, J., Tullo, E., Wakeling, L., & Gilroy, R. (2021). Involving older people in inclusive educational research. *Journal of Aging Studies*, 56, 100906.
- Fortune, D., McKeown, J., Dupuis, S., & de Witt, L. (2015). “It was like reading a detective novel:” Using PAR to work together for culture change. *Journal of Aging Studies*, 34, 38–47.
- Frisbie, D. A. (2005). Measurement 101: Some fundamentals revisited. *Educational Measurement: Issues and Practice*, 24(3), 21-28.
- Fromm, E. (1984). The psychological problems of aging. In E. Fromm, *On disobedience and other essays*. (pp. 117–132). Routledge & Kegan Paul.
- Fudge, N., Wolfe, C., & McKeivitt, C. (2007). Involving older people in health research. *Age and Ageing*, 36(5), 492–500.
- Füller, J., Hutter, K., & Faullant, R. (2011). Why co-creation experience matters? Creative experience and its impact on the quantity and quality of creative contributions. *R&D Management*, 41(3), 259-273.
- Fuller, J. B., Raman, M., Sage-Gavin, E., & Hines, K. (2021). Hidden workers: Untapped talent. *Harvard Business School*, September.
- Fuller, M. (2017). Big data, ethics and religion: New questions from a new science. *Religions*, 8(5), 88.

- Gee, S., & Baillie, J. (1999). Happily ever after? An exploration of retirement expectations. *Educational Gerontology, 25*(2), 109–128.
- Gegeo, D. W., & Watson-Gegeo, K. A. (2001). “How we know”: Kwara’ae rural villagers doing indigenous epistemology. *The Contemporary Pacific, 55*–88.
- George, L. K. (2010). Still happy after all these years: Research frontiers on subjective well-being in later life. *Journals of Gerontology Series B: Psychological Sciences and Social Sciences, 65*(3), 331–339.
- Gergen, K. (1991). *The saturated self*. Basic.
- Gergen, K. J. (1985, March). The social constructionist movement in modern psychology. *American Psychologist, 40*, 266–275.
- Gerken, M. (2017). *On folk epistemology: How we think and talk about knowledge*. Oxford University Press.
- Gibler, K. M., Moschis, G. P. & Lee, E. (1998). Planning to move to retirement housing. *Financial Services Review, 7*, 291–300.
- Gilleard, C., & Higgs, P. (2013). *Aging, corporeality and embodiment*. Anthem Press.
- Gilleard, C., & Higgs, P. (2007). The third age and the baby boomers: Two approaches to the social structuring of later life. *The International Journal of Aging and Later Life, 2*, 13–30.
- Glanz, D., & Neikrug, S. (1997). Seniors as researchers in the study of aging: Learning and doing. *The Gerontologist, 37*, 823–826.
- Glaser, B., & Strauss, A. (1967). *The discovery of grounded theory*. Aldine.
- Glass, A. P. (2012). Elder co-housing in the United States: Three case studies. *Built Environment, 38*(3), 345–363.

- Glass, T. A. (2003). Assessing the success of successful aging. *Annals of Internal Medicine*, 139, 282–283.
- Glass, A. P., & Skinner, J. (2013). Retirement communities: We know what they are . . . or do we? *Journal of Housing for the Elderly*, 27(1–2), 61–88.
- Goethals, L., Barth, N., Guyot, J., Hupin, D., Celarier, T., & Bongue, B. (2020). Impact of home quarantine on physical activity among older adults living at home during the COVID-19 pandemic: qualitative interview study. *JMIR Aging*, 3(1), e19007.
- Goffman, E. (1963). *Stigma: Notes on the management of spoiled identity*. Prentice Hall.
- Goffman, E. (1961). *Encounters: Two studies in the sociology of interaction*. Ravenio Books.
- Goffman, E. (1959). *The presentation of self in everyday life*. Doubleday.
- Goles, T., & Hirschheim, R. (2000). The paradigm is dead, the paradigm is dead . . . long live the paradigm: The legacy of Burrell and Morgan, *Omega*, 28, 249–268.
- Goulding, A., Davenport, D., & Newman, A. (2018). *Resilience and aging: Creativity, culture and community*. Policy Press.
- Graebner, W. (1980). *A history of retirement: The meaning and function of an American institution*. Yale University Press.
- Grant, A. (2019). The surprising value of obvious insights. *MIT Sloan Management Review*, 60(3), 8–10.
- Green, L. W., George, M. A., & Frankish, C. J. (1995). Study of participatory research in health promotion in Canada. *Ottawa, Canada: Royal Society of Canada*.
- Greenfield, E. A., Scharlach, A. E., Lehning, A. J., Davitt, J. K., & Graham, C. L. (2013). A tale of two community initiatives for promoting aging in place: Similarities and differences in



- the national implementation of NORC programs and villages. *The Gerontologist*, 53(6), 928–938.
- Greenhalgh, T., Jackson, C., Shaw, S., & Janamian, T. (2016). Achieving research impact through co-creation in community-based health services: Literature review and case study. *The Milbank Quarterly*, 94(2), 392–429.
- Gutman, C., Hantman, S., Ben-Oz, M., Criden, W., Anghel, R., & Ramon, S. (2014). Involving older adults as co-researchers in social work education. *Educational Gerontology*, 40(3), 186–197.
- Haber, C. (1985). *Beyond sixty-five: The dilemma of old age in America's past*. CUP Archive.
- Hagestad, G. O., & Uhlenberg, P. (2005). The social separation of old and young: A root of ageism. *Journal of Social Issues*, 61(2), 343–360.
- Halvorsrud, K., Kucharska, J., Adlington, K., Rüdell, K., Brown Hajdukova, E., Nazroo, J., Haarmans, M., Rhodes, J., & Bhui, K. (2021). Identifying evidence of effectiveness in the co-creation of research: a systematic review and meta-analysis of the international healthcare literature. *Journal of Public Health*, 43(1), 197–208.
- Hamilton, D. L., Sherman, S. J., & C. M. Ruvolo (1990), Stereotype-based expectancies: Effects on information processing and social behavior. *Journal of Social Issues*, 46(2), 35–60.
- Hammersley, M. (1992). Some reflections on ethnography and validity. *Qualitative Studies in Education*, 5(3), 195–203.
- Hancock, K., Chenoweth, L., & Chang, E. (2003). Challenges in conducting research with acutely ill hospitalized older patients. *Nursing & Health Sciences*, 5(4), 253–259.
- Hansen, E. B., & Gottschalk, G. (2006). What makes older people consider moving house and what makes them move? *Housing, Theory and Society*, 23, 34–54.

- Havighurst, R. J. (1961). Successful aging. *The Gerontologist*, 1, 1, 8–13.
- Havighurst, R. J., & Albrecht, R. (1953). *Older people*. Longmans, Green.
- Hazan, H. (1992). *Managing change in old age: The control of meaning in an institutional setting*. State University of New York Press.
- Heale, R., & Forbes, D. (2013). Understanding triangulation in research. *Evidence-Based Nursing*, 16(4), 98.
- Hepworth, M. (2000). *Stories of ageing*. Open University Press.
- Hill, P. L., Lewis, N. A., & Burrow, A. L. (2020). Purpose after retirement during COVID-19: Trying to find direction in retirement communities. *The American Journal of Geriatric Psychiatry*, 28(7), 788–789.
- Hofer, B. K., & Bendixen, L. D. (2012). Personal epistemology: Theory, research, and future directions. In K. R. Harris, S. Graham, & T. Urdan (Eds.), *APA educational psychology handbook* (Vol. 1, pp. 227–256). American Psychological Association.
- Hogg, M. A., & Smith, J. R. (2007). Attitudes in social context: A social identity perspective. *European Review of Social Psychology*, 18(1), 89–131.
- Hollis, M., & Smith, S. (1996). A response: Why epistemology matters in international theory. *Review of International Studies*, 22(1), 111–116.
- Hooker, S. A., & Masters, K. S. (2016). Purpose in life is associated with physical activity measured by accelerometer. *Journal of Health Psychology*, 21(6), 962–971.
- Hornstein, G. A., & Wapner, S. (1986). Modes of experiencing and adapting to retirement. *The International Journal of Aging and Human Development*, 21(4), 291–15.
- Hou, S. I., & Cao, X. (2021). Promising aging in community models in the U.S.: Village, naturally occurring retirement community (NORC), cohousing, and university-based

- retirement community (UBRC). *Gerontology and Geriatric Medicine*, 7, 23337214211015451.
- Hughes, J. L., Camden, A. A., & Yangchen, T. (2016). Rethinking and updating demographic questions: Guidance to improve descriptions of research samples. *Psi Chi Journal of Psychological Research*, 21(3), 138–151.
- Huijg, J. M., van Delden, A. L. E., van der Ouderaa, F. J., Westendorp, R. G., Slaets, J. P., & Lindenberg, J. (2017). Being active, engaged, and healthy: Older persons' plans and wishes to age successfully. *Journals of Gerontology Series B: Psychological Sciences and Social Sciences*, 72(2), 228-236.
- Hunt, M. E., Feldt, A. G., Marans, R. W., Pastalan, L. A., & Vakalo, K. L. (1984). *Retirement communities: An American original*. The Haworth Press, Inc.
- Hyett, N., Kenny, A., & Dickson-Swift, V. (2014). Methodology or method? A critical review of qualitative case study reports. *International Journal of Qualitative Studies on Health and Well-being*, 9(1), 23606.
- Jacelon, C. S. (2007). Older adults' participation in research. *Nurse Researcher*, 14(4).
- Jackson, H. O., & O'Neal, G. S. (1994). Dress and appearance responses to perceptions of aging. *Clothing and Textiles Research Journal* 12, 8–15.
- Jacobs, J. (1976). *Fun city: An ethnographic study of a retirement community*. New York: Holt, Rinehart and Winston.
- James, L. E., Burke, D. M., Austin, A., & Hulme, E. (1998). Production and perception of “verbosity” in younger and older adults. *Psychology and Aging*, 13(3), 355.
- Jeske, D. (2016). Aging, getting older, and the good life. In Geoffrey Scarre (Ed.) *The Palgrave handbook of the philosophy of aging* (pp. 327–345). Palgrave Macmillan.

- Jivraj, S., Nazroo, J., Vanhoutte, B., & Chandola, T. (2014). Aging and subjective well-being in later life. *Journals of Gerontology Series B: Psychological Sciences and Social Sciences*, 69(6), 930–941.
- Johnston, K. A., & Lane, A. B. (2018). Building relational capital: The contribution of episodic and relational community engagement. *Public Relations Review*, 44(5), 633-644.
- Katz, S. (2005). *Cultural aging: Lifecourse, lifestyle, and senior worlds*. Broadview Press.
- Katz, S. (2019). *Ageing in everyday life: Materialities and embodiments*. Policy Press.
- Katz, S., & McHugh, K. (2010). Age, meaning and place: Cultural narratives and retirement communities. In Cole, T. R., Ray, R. E. and Kastenbaum, R. (Eds), *A guide to humanistic studies in aging*. (pp. 271–92). Johns Hopkins University Press.
- Kingston, P., Bernard, M., Biggs, S., & Nettleton, H. (2001). Assessing the health impact of age-specific housing. *Health and Social Care in the Community*, 9(4), 228–234.
- Kleiber, D. A., Walker, G. J., & Mannell, R. C. (2011). *A social psychology of leisure*. Venture.
- Koelsch, L. E. (2013). Reconceptualizing the member check interview. *International Journal of Qualitative Methods*, 12, 168–179.
- Korstjens, I., & Moser, A. (2018). Series: Practical guidance to qualitative research. Part 4: Trustworthiness and publishing, *European Journal of General Practice*, 24(1), 120–124.
- Kratochwil, F. (2008). Constructivism: What it is (not) and how it matters. In Della Porta, D., & Keating, M. (Eds.) *Approaches and methodologies in the social sciences: A pluralist perspective* (pp. 80–98). Cambridge University Press.
- Kunkel, S., & Settersten, R. A., Jr. (2021). *Aging, society, and the life course* (6th ed.). Springer Publishing Company.

- Kwon, H. J., Ahn, M., Lee, S.-J., & Kim, S.-K. (2015). U. S. Baby Boomers' desire to age in place and residential satisfaction. *Journal of Housing for the Elderly*, 29, 348–372.
- LaBauve, B. J., & Robinson, C. R. (1999). Adjusting to retirement: Considerations for counselors. *Adultspan Journal*, 1(1), 2–12.
- Lacan, J. (1989). *Ecrits: A selection*. (A. Sheridan, Trans.) Routledge.
- Lahman, M. K. (2017). *Ethics in social science research: Becoming culturally responsive*. Sage.
- Lahman, M. K., Geist, M. R., Rodriguez, K. L., Graglia, P., & DeRoche, K. K. (2011). Culturally responsive relational reflexive ethics in research: The three Rs. *Quality & Quantity*, 45(6), 1397–1414.
- Laslett, P. (1991). *A fresh map of life: The emergence of the Third Age*. Macmillan.
- Laz, C. (1998). Act your age. *Sociological Forum*, 13(1), 85–113.
- Leary, M. R., & Kowalski, R. M. (1990). Impression management: A literature review and two-component model. *Psychological Bulletin*, 107(1), 34.
- Leask, C. F., Sandlund, M., Skelton, D. A., Altenburg, T. M., Cardon, G., Chinapaw, M. J., De Bourdeaudhuij, I., Verloigne, M., & Chastin, S. F. (2019). Framework, principles and recommendations for utilising participatory methodologies in the co-creation and evaluation of public health interventions. *Research Involvement and Engagement*, 5(1), 1–16.
- Lee, Y., Chi, I., & Palinkas, L. A. (2019). Retirement, leisure activity engagement, and cognition among older adults in the United States. *Journal of Aging and Health*, 31(7), 1212–1234.
- Lemon, B. W., Bengtson, V. L., & Peterson, J. A. (1972). An exploration of the activity theory of aging: Activity types and life satisfaction among in-movers to a retirement community. *Journal of Gerontology*, 27, 511–23.

- Levinger, P., Cerin, E., Milner, C., & Hill, K. D. (2022). Older people and nature: The benefits of outdoors, parks and nature in light of COVID-19 and beyond—where to from here? *International Journal of Environmental Health Research*, 32(6), 1329–1336.
- Levy, B. R. (2001). Eradication of ageism requires addressing the enemy within. *The Gerontologist*, 41(5), 578–579.
- Levy, B. R., & Banaji, M. R. (2002). Implicit ageism. In T. D. Nelson (Ed.), *Ageism: Stereotyping and prejudice against older persons*. (pp. 49–75). The MIT Press.
- Levy, B. R., Slade, M. D., Kunkel, S. R., & Kasl, S. V. (2002). Longevity increased by positive self-perceptions of aging. *Journal of Personality and Social Psychology*, 83(2), 261.
- Lin, X., & Bryant, C. (2009). Students' attitudes toward older people: A cross-cultural comparison. *Journal of Intergenerational Relationships*, 7(4), 411–424.
- Lincoln, Y. S., & Guba, E. G. (1985). *Naturalistic inquiry*. Sage.
- Littlechild, R., Tanner, D., & Hall, K. (2015). Co-research with older people: perspectives on impact. *Qualitative Social Work*, 14(1), 18–35.
- Lofland, J., Snow, D. A., & Anderson, L. (2005). *Analyzing social settings: A guide to qualitative observation and analysis* (4th ed.). Wadsworth Publishing.
- Logan, G. T. (2001). Gauging the market for active adult communities. In D.R. Suchman (Ed.), *Developing active adult retirement communities* (pp. 33–55). The Urban Land Institute (UTI).
- Longino, C. F., & Kart, C. S. (1982). Explicating activity theory: A formal replication. *Journal of Gerontology*, 37, 713–22.

- López, J., Pérez-Rojo, G., Noriega, C., Martínez-Huertas, J. A., & Velasco, C. (2022). Longitudinal impact of the COVID-19 pandemic on older adults; wellbeing. *Frontiers in Psychiatry, 13*, 837533.
- Lowsky, D. J., Olshansky, S. J., Bhattacharya, J., & Goldman, D. P. (2014). Heterogeneity in healthy aging. *Journals of Gerontology Series A: Biomedical Sciences and Medical Sciences, 69*, 640–649.
- Luborsky, M. R., & LeBlanc, I. M. (2003). Cross-cultural perspectives on the concept of retirement: An analytic redefinition. *Journal of Cross-Cultural Gerontology, 18*, 251–271.
- Lucas, R. (2016). Subjective well-being in psychology. *The Oxford handbook of well-being and public policy, 1*, 403–423.
- Lucas, R. (2018). Reevaluating the strengths and weaknesses of self-report measures of subjective well-being. In E. Diener, S. Oishi, & L. Tay (Eds.), *Handbook of well-being*. DEF Publishers.
- Manning, P. (2004). Dramaturgy. In Ritzer, G. (Ed.), *Encyclopedia of social theory*. (pp. 210–213). Sage.
- Marshall, P., Kelder, J. A., & Perry, A. (2005). Social constructionism with a twist of pragmatism: A suitable cocktail for information systems research. 16th Australasian Conference on Information Systems, Sydney, Australia.
- Martinez, L., Mirza, R. M., Austen, A., Hsieh, J., Klinger, C. A., Kuah, M., Liu, A., McDonald, L., Mohsin, R., Pang, C., Rajewski, J., Salomons, T., & Sheikh, I. (2020). More than just a room: A scoping review of the impact of homesharing for older adults. *Innovation in Aging, 4*(2), igaa011.

- Martinson, M., & Berridge, C. (2015). Successful aging and its discontents: A systematic review of the social gerontology literature. *The Gerontologist, 55*(1), 58–69.
- Mason, J. (2002). *Qualitative researching* (2nd ed.). Sage.
- Matz-Costa, C., Besen, E., James, J., & Pitt-Catsouphes, M. (2012). Differential impact of multiple levels of productive activity engagement on psychological well-being in middle and later life. *The Gerontologist, 54*(2), 277–289.
- Maxwell, J. A. (2013). *Qualitative research design: An interactive approach*. Sage.
- McAuley, E., Blissmer, B., Katula, J., Duncan, T. E., & Mihalko, S. L. (2000). Physical activity, self-esteem, and self-efficacy relationships in older adults: A randomized controlled trial. *Annals of Behavioral Medicine, 22*(2), 131-139.
- McFadyen, J., & Rankin, J. (2016). The role of gatekeepers in research: Learning from reflexivity and reflection. *GSTF Journal of Nursing and Health Care (JNHC), 4*(1).
- McHugh, K. E. (2003). Three faces of ageism: Society, image and place. *Aging & Society, 23*, 165–185.
- McHugh, K. E., & Larson-Keagy, E. M. (2005). These white walls: The dialectic of retirement communities. *Journal of Aging Studies, 19*, 241–256.
- Menec, V. H. (2003). The relation between everyday activities and successful aging: A 6-year longitudinal study. *The Journals of Gerontology Series B: Psychological Sciences and Social Sciences, 58*(2), S74-S82.
- Merriam, S. B. (1998). *Qualitative research and case study applications in education*. Jossey-Bass.
- Merriam, S. B. (2009). *Qualitative research: A guide to design and implementation*. Jossey-Bass.



MetLife Mature Market Institute and the National Association of Homebuilders. (2009, April).

*Housing for the 55+ market: Trends and insights on boomers and beyond*, Retrieved

February 1, 2010, from <http://www.maturemarketinstitute.com>

Michael, Y. L., Green, M. K., & Farquhar, S. A. (2006). Neighborhood design and active aging. *Health Place*, 12, 734–740.

Miles, M. B., Huberman, M., & Saldaña, J. (2014). Drawing and verifying conclusions. In *Qualitative data analysis: A methods sourcebook* (pp. 275–322). Sage.

Minkler, M., & Estes, C. L. (1999). *Critical gerontology: Perspectives from political and moral economy*. Baywood Publishers.

Mishler, E. G. (1986). *Research interviewing: Context and narrative*. Harvard University Press.

Monahan, C., Macdonald, J., Lytle, A., Apriceno, M., & Levy, S. R. (2020). COVID-19 and ageism: How positive and negative responses impact older adults and society. *American Psychologist*, 75(7), 887–896.

Morell, C. M. (2003). Empowerment and long-living women: Return to the rejected body. *Journal of Ageing Studies*, 17, 69–85.

Morrow-Howell, N., Putnam, M., Lee, Y. S., Greenfield, J. C., Inoue, M., & Chen, H. (2014). An investigation of activity profiles of older adults. *Journals of Gerontology Series B: Psychological Sciences and Social Sciences*, 69(5), 809–821.

Morrow-Howell, N., & Wang, Y. (2013). Productive engagement of older adults: elements of a cross-cultural research agenda. *Ageing International*, 38(2), 159–170.

Morse, J. M. (1998). Validity by committee. *Qualitative Health Research*, 8(4), 443–445.

Mullen, A. J., Antonucci, T. C., Webster, N., & Smith, E. (2011). The market for independent living: Understanding drivers of demand. *Seniors Housing & Care Journal*, 19, 131–138.

National Aging in Place Council. (n.d.). Aging in place: Growing older at home.

<https://www.nia.nih.gov/health/aging-place-growing-older-home>

National Commission for the Protection of Human Subjects of Biomedical and Behavioral

Research. (1979). *The Belmont report: Ethical principles and guidelines for the*

*protection of human subjects of research*. U.S. Department of Health and Human

Services. [https://www.hhs.gov/ohrp/regulations-and-policy/belmont-report/read-the-](https://www.hhs.gov/ohrp/regulations-and-policy/belmont-report/read-the-belmont-report/index.html)

[belmont-report/index.html](https://www.hhs.gov/ohrp/regulations-and-policy/belmont-report/read-the-belmont-report/index.html)

Nelson, L. H. (1993). Epistemological communities. In L. Alcoff and E. Potter (Eds.), *Feminist*

*epistemologies* (pp. 121–160). Routledge.

Nelson, T. D. (2005). Ageism: Prejudice against our feared future self. *Journal of Social*

*Issues*, 61(2), 207–221.

Neugarten, B. L. (1974). Age groups in American society and the rise of the young-old. *The*

*annals of the American Academy of Political and Social Science*, 415(1), 187–198.

Neuhofner, B. (2016). Innovation through co-creation: Towards an understanding of technology-

facilitated co-creation processes in tourism. In *Open tourism* (pp. 17–33). Springer,

Berlin, Heidelberg.

Neves, B. B., Sanders, A., & Kokanović, R. (2019). “It’s the worst bloody feeling in the world”:

Experiences of loneliness and social isolation among older people living in care

homes. *Journal of Aging Studies*, 49, 74–84.

Ng, R., & Lim-Soh, J. W. (2021). Ageism linked to culture, not demographics: Evidence from an

8-billion-word corpus across 20 countries. *The Journals of Gerontology: Series B*, 76(9),

1791-1798.

- Ngozwana, N. (2018). Ethical dilemmas in qualitative research methodology: researcher's reflections. *International Journal of Educational Methodology*, 4(1), 19–28.
- Nielson, L., Wiles, J., & Anderson, A. (2019). Social exclusion and community in an urban retirement village. *Journal of Aging Studies*, 49, 25–30.
- Nishimi, K., Glickman, E., Smith, K., Ben-Joseph, E., Carson, S., Vranceanu, A. M., & Dunn, E. C. (2022). Master-planned communities in the United States as novel contexts for individual and population-level research. *Preventive medicine*, 154, 106864.
- Olson, W. R., & Sommers, W. A. (2004). *A trainer's companion: Stories to stimulate reflection, conversation, action*. Aha! Process, Inc.
- Onwuegbuzie, A. J., & Leech, N. L. (2005). On becoming a pragmatic researcher: The importance of combining quantitative and qualitative research methodologies. *International Journal of Social Research Methodology: Theory & Practice*, 8(5), 375–387.
- Paganini-Hill, A. (2013). Aging in place in a retirement community: 90+ year olds. *Journal of Housing for the Elderly*, 27(1-2), 191-205.
- Palmore, E. (2001). The ageism survey: First findings. *The Gerontologist*, 41(5), 572–575.
- Parker, S. (2022). *Work and retirement*. Routledge.
- Parniak, S., DePaul, V. G., Frymire, C., DePaul, S., & Donnelly, C. (2022). Naturally occurring retirement communities: Scoping review. *JMIR Aging*, 5(2), e34577.
- Partridge, E. E. (2022). We tell our own stories: Older adults as expert researchers. In *The Palgrave handbook of innovative community and clinical psychologies* (pp. 615-630). Palgrave Macmillan, Cham.

- Peace, S. M., Holland, C., & Kellaher, L. (2006). *Environment and identity in later life*. Open University Press.
- Peirce, C. S. (1931–1958). *Collected writings* (8 vols.). (Eds. Charles Hartshorne, Paul Weiss & Arthur W Burks). Harvard University Press.
- Peirce, C. S. (1902). Pragmatic and pragmatism. In J. M. Baldwin (Ed.), *Dictionary of philosophy and psychology, Vol. II*. (pp. 321–323). Macmillan and Co.
- Petersen, M., & Warburton, J. (2012). Residential complexes in Queensland, Australia: A space of segregation and ageism? *Aging and Society*, 32(1), 60–84.
- Phelan, E. A., Anderson, L. A., Lacroix, A. Z., & Larson, E. B. (2004). Older adults' views of “successful aging”—how do they compare with researchers’ definitions? *Journal of the American Geriatrics Society*, 52(2), 211–216.
- Phoenix, C., & Orr, N. (2014). Pleasure: A forgotten dimension of physical activity in older age. *Social Science & Medicine*, 115, 94–102.
- Pilkington, P. D., Windsor, T. D., & Crisp, D. A. (2012). Volunteering and subjective well-being in midlife and older adults: The role of supportive social networks. *The Journals of Gerontology: Series B: Psychological Sciences and Social Sciences*, 67B, 249–260.
- Pipher, M. B. (1999). *Another country: Navigating the emotional terrain of our elders*. Riverhead Books.
- Rager, K. B. (2005). Self-care and the qualitative researcher: When collecting data can break your heart. *Educational Researcher*, 34(4), 23–27.
- Raymer, M., Reed, M., Spiegel, M., & Purvanova, R. K. (2017). An examination of generational stereotypes as a path towards reverse ageism. *The Psychologist-Manager Journal*, 20(3), 148.

- Reding, N. (2009). *Methland: The death and life of an American small town*. Bloomsbury.
- Redmond, M. V. (2015). Symbolic interactionism. In *English technical reports and white papers*  
4. Iowa State University. [http://lib.dr.iastate.edu/engl\\_reports/4](http://lib.dr.iastate.edu/engl_reports/4)
- Repetti, M., & Calasanti, T. (2017). ‘Since I retired, I can take things as they come. For example, the laundry’: Gender, class and freedom in retirement in Switzerland. *Aging and Society*, 38(8), 1556–1580.
- Resnick, B., Concha, B., Burgess, J. G., Fine, M. L., West, L., Baylor, K., Nahm, E. S., Buie, V. C., Custis, V., Werner, M., Orwig, D., & Magaziner, J. (2003). Recruitment of older women: Lessons learned from the Baltimore hip studies. *Nursing Research*, 52(4), 270–273.
- Riessman, C. K. (1993). *Narrative analysis* (Vol. 30). Sage.
- Riley, M. W. (1987). On the significance of age in sociology. *American Sociological Review*, 52, 1–14.
- Robbins, L. A. (2015). The pernicious problem of ageism. *Generations*, 39(3), 6–9.
- Roberts, P., & Priest, H. (2006). Reliability and validity in research. *Nursing Standard*, 20(44), 41–46.
- Roebuck, J. (1979). When does “old age” begin? The evolution of the English definition. *Journal of Social History*, 12(3), 416–428.
- Rosel, N. (2003). Aging in place: Knowing where you are. *The International Journal of Aging and Human Development*, 57(1), 77–90.
- Ross, F., Donovan, S., Brearley, S., Victor, C., Cottee, M., Crowther, P., & Clark, E. (2005). Involving older people in research: methodological issues. *Health & Social Care in the Community*, 13(3), 268–275.

- Roth, E. G., Keimig, L., Rubinstein, R. L., Morgan, L., Eckert, J. K., Goldman, S., & Peeples, A. D. (2012). Baby boomers in an active adult retirement community: Comity interrupted. *The Gerontologist, 52*(2), 189–198.
- Rowe, J. W., & Kahn, R. L. (1997). Successful aging. *The Gerontologist, 37*, 433-440.
- Rowe, J. W., & Kahn, R. L. (1998). *Successful aging*. Pantheon Books.
- Rowe, J. W., & Kahn, R. L. (2015). Successful Aging 2.0: Conceptual Expansions for the 21st Century. *The Journals of Gerontology, Series B: Psychological Sciences and Social Sciences, 70*, 593–596.
- Roy, A. (2012). Avoiding the involvement overdose: Drugs, ethnicity and participatory research practice. *Critical Social Policy 32*(4): 636–654.
- Rozario, P. A., & Derienzis, D. (2009). ‘So forget how old I am!’ Examining age identities in the face of chronic conditions. *Sociology of Health and Illness, 31*(4), 540–553.
- Ryan, R. M., Weinstein, N., Bernstein, J., Brown, K. W., Mistretta, L., & Gagné, M. (2010). Vitalizing effects of being outdoors and in nature. *Journal of Environmental Psychology, 30*(2), 159–168.
- Sabia, J. J. (2008). There’s no place like home: A hazard model analysis of aging in place among older homeowners in the PSID. *Research on Aging, 20*, 3–35.
- Saldaña, J. (2013). *The coding manual for qualitative researchers*. Sage.
- Samuel, L. R. (2017). *Aging in America: A cultural history*. University of Pennsylvania Press.

- Sasaki, S., Sato, A., Tanabe, Y., Matsuoka, S., Adachi, A., Kayano, T., Yamazaki, H., Matsuno, Y., Miyake, A., & Watanabe, T. (2021). Associations between socioeconomic status, social participation, and physical activity in older people during the COVID-19 pandemic: A cross-sectional study in a northern Japanese city. *International Journal of Environmental Research and Public Health*, *18*(4), 1477.
- Saunders, M. N. (2012). Choosing research participants. In G. Symon & C. Cassell (Eds.), *Qualitative organizational research: Core methods and current challenges* (pp. 35–520).
- Saussure, F. de. (1916/1983). *Course in general linguistics* (trans. Roy Harris). Duckworth.
- Scarmeas, N., & Stern, Y. (2003). Cognitive reserve and lifestyle. *Journal of Clinical and Experimental Neuropsychology*, *25*, 625–633.
- Scharf, T., McDonald, B., & Adkins, A. M. (2016). *Promoting civic engagement in later life through the Touchstone Programme: A resource and research guide*. NUI Galway. Retrieved from <https://core.ac.uk/download/pdf/327346084.pdf>.
- Scharlach, A. E. (2009). Creating aging-friendly communities. *Generations*, *33*(2), 5–11.
- Scharlach, A., Graham, C., & Lehning, A. (2012). The “Village” model: A consumer-driven approach for aging in place. *The Gerontologist*, *52*(3), 418-427.
- Scheidt, R. J. (2020). Ageless. *The Gerontologist*, *60*(7), 1376–1378.
- Schramm, W. (1971). *Notes on case studies for instructional media projects*. Working paper for Academy of Educational Development, Washington DC.
- Schulte, P. A., Grosch, J., Scholl, J. C., & Tamers, S. L. (2018). Framework for considering productive aging and work. *Journal of Occupational and Environmental Medicine*, *60*(5), 440.

- Schuster, J. G. (2016). Like Disney for adults: Life in freedom village. *Sociology Between the Gaps: Forgotten and Neglected Topics*, 2(1), 9.
- Schwartz, B., & Cheek, N. N. (2017). Choice, freedom, and well-being: Considerations for public policy. *Behavioural Public Policy*, 1(1), 106.
- Schwitter, N. (2020). Social capital in retirement villages: A literature review. *Ageing & Society*, 1–29.
- Searle, J. R. (1995). *The construction of social reality*. Free Press.
- Seetharaman, K., Mahmood, A., & Chaudhury, H. (2020). A scoping review of innovative housing for older adults: Focus on homesharing, cohousing, NORC-SSPs, and villages. *Innovation in Aging*, 4(Supplement\_1), 31-32.
- Sekot, A. (2010). Physical activity as a sociological phenomenon. *Sport Science Review*, 19(5–6), 29.
- Seligman, L. (1994). *Developmental career counselling and assessment* (2nd ed.). Sage.
- Seltzer, J., & Yahirun, J. (2013). Diversity in old age: The elderly in changing economic and family contexts. *UCLA CCPR Population Working Papers*.
- Shaw, B. A., Liang, J., Krause, N., Gallant, M., & McGeever, K. (2010). Age differences and social stratification in the long-term trajectories of leisure-time physical activity. *The Journals of Gerontology, Series B: Psychological Sciences and Social Sciences*, 65B, 756–766.
- Shir-Wise, M. (2019). Disciplined freedom: The productive self and conspicuous busyness in “free” time. *Time & Society*, 28(4), 1668–1694.
- Sieber, J. E. (1992). *Planning ethically responsible research*. Sage.



- Simons, H. (2009). Evolution and concept of case study research. *Case Study Research in Practice*, 12–28.
- Smith, A. N., Watkins, M. B., Burke, M. J., Christian, M. S., Smith, C. E., Hall, A., & Simms, S. (2013). Gendered influence: A gender role perspective on the use and effectiveness of influence tactics. *Journal of Management*, 39(5), 1156–1183.
- Smith, N., Towers, A. M., Palmer, S., Beecham, J., & Welch, E. (2018). Being occupied: supporting “meaningful activity” in care homes for older people in England. *Ageing and Society*, 38(11), 2218–2240.
- Snape, D., Kirkham, J., Britten, N., Froggatt, K., Gradinger, F., Lobban, F., Popay, J., Wyatt, K., & Jacoby, A. (2014). Exploring perceived barriers, drivers, impacts and the need for evaluation of public involvement in health and social care research: A modified Delphi study. *BMJ Open*, 4(6).
- Son, J., Erno, A., Shea, D. G., Femia, E. E., Zarit, S. H., & Stephens, M. (2007). The caregiver stress process and health outcomes. *Journal of Aging & Health*, 19, 871–887.
- Son, J. S., Nimrod, G., West, S. T., Janke, M. C., Liechty, T., & Naar, J. J. (2021). Promoting older adults’ physical activity and social well-being during COVID-19. *Leisure Sciences*, 43(1–2), 287–294.
- Southey, R. (1837). *The story of the three bears*. Ichthus Academy.
- Stake, R. E. (1978). The case study method in social inquiry. *Educational Researcher*, 7(2), 5–8.
- Stake, R. E. (1994). Case study: Composition and performance. *Bulletin of the Council for Research in Music Education*, 31–44.
- Stake, R. E. (1995). *The art of case study research*. Sage.
- Stake, R. E. (2006). *Multiple case study analysis*. The Guilford Press.

- Stemler, S. (2001). An overview of content analysis, *Practical Assessment, Research & Evaluation*, 7, 137–146.
- Strauss, A., & Corbin, J. (1998). *Basics of qualitative research* (2nd ed.). Sage.
- Stryker, S. (1980). *Symbolic interaction: A social structural version*. Benjamin/Cummings.
- Stuen, C., & Kaye, L. W. (1990). Retired university faculty: Untapped expertise. *Adult Learning*, 1(4), 25–27.
- Stuhr, J. J. (2020). Truth, truths, and pluralism. *The Journal of Speculative Philosophy* 34(4), 526–544.
- Stutchbury, K., & Fox, A. (2009). Ethics in educational research: introducing a methodological tool for effective ethical analysis. *Cambridge Journal of Education*, 39(4), 489-504.
- Suarez-Balcazar, Y. (2020). Meaningful engagement in research: Community residents as co-creators of knowledge. *American Journal of Community Psychology*, 65(3–4), 261–271.
- Szanton, S. L., Walker, R. K., Roberts, L., Thorpe, R. J., Jr., Wolff, J., Agree, E., Roth, D. L., Gitlin, L. N., & Seplaki, C. (2015). Older adults' favorite activities are resoundingly active: Findings from the NHATS study. *Geriatric Nursing*, 36(2), 131–135.
- Tada, J. E. (2010). *Joni: An unforgettable story*. Zondervan.
- Taherdoost, H. (2016). Validity and reliability of the research instrument: How to test the validation of a questionnaire/survey in a research study. *International Journal of Academic Research in Management*, 5(3), 28–36.
- Tartaglione, A. M., Cavacece, Y., Cassia, F., & Russo, G. (2018). The excellence of patient-centered healthcare: Investigating the links between empowerment, co-creation and satisfaction. *The TQM Journal*.

- Taylor, C. (1971). Interpretation and the sciences of man. *The Review of Metaphysics*, 25(1), 3–51.
- Teater, B., & Chonody, J. M. (2020). How do older adults define successful aging? A scoping review. *The International Journal of Aging and Human Development*, 91(4), 599–625.
- Tedeschi, J. T., & Riess, M. (1981). Identities, the phenomenal self, and laboratory research. *Impression Management Theory and Social Psychological Research*, 3, 22.
- Thane, P. (2010). The history of aging and old age in “Western” cultures. In T. R. Cole, R. E. Ray, & R. Kastenbaum (Eds.), *A guide to humanistic studies in aging: What does it mean to grow old?* (pp. 33–56). The Johns Hopkins University Press.
- Thoits, P., & Hewitt, L. (2001). Volunteer work and well-being. *Journal of Health and Social Behavior*, 42, 115–131.
- Thomas, W. H. (2004). *What are old people for? How elders will save the world*. VanderWyk & Burnham.
- Thompson, J., Barber, R., Ward, P. R., Boote, J. D., Cooper, C. L., Armitage, C. J., & Jones, G. J. (2009). Health researchers’ attitudes toward public involvement in health research. *Health Expectations*, 12(2), 209–220.
- Timmerman, S. (2006). Housing and retirement living: Redesigning the continuum. *Journal of Financial Service Professionals*, 60, 23–27.
- Timonen, V. (2016). *Beyond successful and active aging: A theory of model aging*. Policy Press.
- Tréhu, J. (2017). The shaky foundations of Millennials’ basic human needs. *Society*, 54(6), 533–534.
- Trolander, J. A. (2011a). Age 55 or better: Active adult communities and city planning. *Journal of Urban History*, 37(6), 952–974.

- Trolander, J. A. (2011b). *From sun cities to the villages: A history of active-adult, age-restricted communities*. University Press of Florida.
- Tulle, E. (2008). *Aging, the body and social change*. Palgrave.
- Tubridy, D. (2018). *Samuel Beckett and the language of subjectivity*. Cambridge University Press.
- Vaillant, G. E., Linley P. A., & Joseph, S. (2004). Positive aging. In P. Alex Linley & Stephen Joseph (Eds.), *Positive psychology in practice* (pp. 561–578). Wiley.
- Vallacher, R. R., Wegner, D. M., McMahan, S. C., Cotter, J., & Larsen, K. A. (1992). On winning friends and influencing people: Action identification and self-presentation success. *Social Cognition, 10*(3), 335–355.
- van den Berg, A., Dewar, B., Smits, C., & Jukema, J. S. (2019). Experiences of older adults and undergraduate students in co-creating age-friendly services in an educational living lab. *International Practice Development Journal, 9*(2), 1–14.
- VanWynsberghe, R., & Khan, S. (2007). Redefining case study. *International Journal of Qualitative Methods, 6*(2), 80–94.
- Vasunilashorn, S., Steinman, B. A., Liebig, P. S., & Pynoos, J. (2012). Aging in place: Evolution of a research topic whose time has come. *Journal of Aging Research, 2012*.
- Veenhoven, R. (2012). Happiness: Also known as “life satisfaction” and “subjective well-being”. In *Handbook of social indicators and quality of life research* (pp. 63–77). Springer, Dordrecht.
- Vincent, G. K., & Velkoff, V. A. (2010). *The next four decades: The older population in the United States: 2010 to 2050*. U.S. Census Bureau.

- Wahl, H. W., & Weisman, G. D. (2003). Environmental gerontology at the beginning of the new millennium: Reflections on its historical, empirical, and theoretical development. *The Gerontologist, 43*, 616–627.
- Walker, A. (2007). Why involve older people in research? *Age and Aging, 36*, 481–483.
- Walker, A., & Maltby, T. (2012). Active aging: A strategic policy solution to demographic aging in the European Union. *International Journal of Social Welfare, 21*(1), 117–130.
- Walsham, G. (1993). *Interpreting information system in organizations*. John Wiley.
- Wang, M. (2007). Profiling retirees in the retirement transition and adjustment process: Examining the longitudinal change patterns of retirees' psychological well-being. *Journal of Applied Psychology, 92*, 455–474.
- Wang, M., & Shi, J. (2014). Psychological research on retirement. *Annual Review of Psychology, 65*, 209–233.
- Wanka, A. (2021). Older adults as co-creators in the research process: An overview of concepts, methods, and approaches. *Innovation in Aging, 5*(Suppl 1), 388-388.
- Warren, L., & Cook, J. (2005). Working with older women in research: Benefits and challenges. In L. Lowes L & I. Hulatt (Eds.), *Involving service users in health and social care research*. (pp. 171–189).
- Weil, J. (2014). *The new neighborhood senior center: Redefining social and service roles for the baby boom generation*. Rutgers University Press.
- Weil, J. (2015). Applying research methods to a gerontological population: Matching data collection to characteristics of older persons. *Educational Gerontology, 41*, 723–742.

- Weil, J., Mendoza, A. N., & McGavin, E. (2017). Recruiting older adults as participants in applied social research: Applying and evaluating approaches from clinical studies. *Educational Gerontology, 43*(12), 662–673.
- Weiss, R. R. (2005). *The experience of retirement*. Cornell University Press.
- Wenger, G. (2001). Interviewing older people. In J. F. Gubrium & J. A. Holstein (Eds.), *Handbook of interview research*. (pp. 259–278). Sage.
- White, J., Drew, S., & Hay, T. (2009). Ethnography versus case study-positioning research and researchers. *Qualitative Research Journal, 9*(1), 18-27.
- Wiles, J. L., Leibing, A., Guberman, N., Reeve, J., & Allen, R. E. (2012). The meaning of “aging in place” to older people. *The Gerontologist, 52*(3), 357–366.
- Wolcott, H. F. (2005). *The art of fieldwork*. Rowman Altamira.
- Wood, J. (1992). *Spinning the symbolic web: Human communication as symbolic interaction*. Ablex Publishing.
- Woodward, K. (2006). Performing age, performing gender. *NWSA Journal, 18*(1), 162–189.
- Yazan, B. (2015). Three approaches to case study methods in education: Yin, Merriam, and Stake. *The Qualitative Report, 20*(2), 134–152.
- Yen, I. H., Shim, J. K., Martinez, A. D., & Barker, J. C. (2012). Older people and social connectedness: How place and activities keep people engaged. *Journal of Aging Research, 2012*.
- Yin, R. K. (2014). *Case study research: Design and methods* (5th ed.). Sage.
- Young, R., & Collin, A. (2004). Introduction: Constructivism and social constructionism in the career field. *Journal of Vocational Behaviour 64*(3), 373–388.

- Zhan, Y., Wang, M., Liu, S., & Shultz, K. S. (2009). Bridge employment and retirees' health: A longitudinal investigation. *Journal of Occupational Health Psychology, 14*, 374–389.
- Zhang, L., Yu, Q., Zhang, Q., Guo, Y., & Chen, J. (2020). The relationship between explicit self-esteem and subjective well-being: The moderating effect of implicit self-esteem. *The Journal of General Psychology, 147*(1), 1–17.

APPENDIX A  
DEFINITION OF TERMS



### **Definition of Terms**

Active Aging – “continuing participation in social, economic, cultural, spiritual, and civic affairs, not just the ability to be physically active or to participate in the labor force” (WHO, 2002, as cited in Teater & Chonody, 2020, p. 601).

Active Adult Retirement Community – Age-restricted community, usually catering to those 50–55 and older with a focus on an active lifestyle features amenities and clubs.

Ageism – A prejudicial attitude toward any individual or group based on age.

Aging in Place – “the ability to live in one’s own home and community safely, independently, and comfortably, regardless of age, income, or ability level.”

Case Study – A study featuring a small N (typically an N of one—individual or bounded system, that contains “contextual detail,” a “natural setting,” and “multiple data sources” (VanWynsberghe & Khan, 2007).

Co-Creation – generally defined as “the collaborative generation of knowledge by academics working alongside stakeholders from other sectors” (Greenhalgh et al., 2016, p. 393).

Old Age – Usually defined as the age when one becomes eligible for Social Security or state pension benefits but is complicated by differences in how individuals experience aging.

Participant Observation – Method in which a researcher takes part in activities with participants.

Retirement – Cessation of paid employment; although some “retired” people continue to work part-time or on a contract basis even after they have officially “retired.”

Successful Aging – Often portrayed as “active, engaged, and healthy” (Huijg et al., 2017, p. 234),

APPENDIX B  
DEMOGRAPHIC ITEMS

## Demographic Items

The following demographic questions will help me create a descriptive summary of the people who have participated in my study.

1. How do you currently describe your gender identity?  
Please specify \_\_\_\_\_  
I prefer not to answer
  
2. What is your age in years?  
Please specify \_\_\_\_\_  
I prefer not to answer
  
3. Which categories describe you? Select all that apply to you:  
American Indian or Alaska Native  
Asian  
Black or African American  
Hispanic, Latino, or Spanish origin  
Middle Eastern or North African  
Native Hawaiian or Other Pacific Islander  
White  
Some other race, ethnicity, or origin, please specify: \_\_\_\_\_  
I prefer not to answer
  
4. Which categories describe you? Select all that apply to you”  
Some high school  
High school diploma or equivalent  
Vocational training  
Some college  
Associate’s degree  
Bachelor’s degree  
Some post undergraduate work  
Master’s degree  
Specialist degree  
Applied or professional doctorate degree  
Doctorate degree  
Other, please specify

5. Do you have a long-lasting or chronic condition (physical, visual, auditory, cognitive or mental, emotional, or other) that substantially limits one or more of your major life activities (your ability to see, hear, or speak; to learn, remember, or concentrate)?
- Yes  
No  
I prefer not to answer
- If yes, please indicate the terms that best describe the condition(s) you experience  
Please specify \_\_\_\_\_  
I prefer not to answer
6. Which best describes your current employment status?
- Work full time (35 or more hours per week)  
Work part time (less than 35 hours per week)  
Do not work
7. Are you currently in a romantic relationship?
- Yes  
No  
I prefer not to answer
- If you answered yes, are you (Mark all that apply)
- Not applicable  
Married or in a civil union and living together  
Married or in a civil union and living apart  
Not married or in a civil union and living together  
Not married or in a civil union and living apart
8. How do you describe your religion, spiritual practice, or existential worldview?
- Please specify \_\_\_\_\_  
I prefer not to answer
9. Which social class group do you identify with?
- Poor  
Working class  
Middle class  
Affluent
10. What is your approximate annual income?
- Please specify \_\_\_\_\_  
I prefer not to answer

APPENDIX C  
RECRUITMENT LETTER

## Recruitment Letter

Dear [insert name],

You have been contacted by [insert gatekeeper's name] about the possibility of participating in my study on activity in older adults living in an age-restricted community, and have already emailed me to indicate your willingness to participate. Thank you! I am so pleased to have you as part of the team. As [insert gatekeeper's name] will have explained, I am not only studying activity in older adults but also looking at how to best involve older adults as co-creators of research—allowing them to contribute their considerable expertise and skill toward problems that interest them. To that end, I will be seeking your thoughts not only on activity but on how and to what extent you might be willing to assist researchers (theoretically), and what conditions would make this kind of participation most meaningful for you.

To begin with, I am attaching two copies of a journal that I would like you each to fill out each day for fourteen days. The journal itself contains instructions, but in short I would like you to write down everything you do each day that you think of as an “activity.” You will also indicate whether it took place at Trilogy Redmond Ridge or not, and the level to which you enjoyed it. I will send a couple of email reminders, not because I don't trust you, but because I know that you, like me, have a lot to do and it is easy to forget things. I appreciate reminders!

Ideally, I would like the journals completed by Friday, June 18, when I will be arriving at Trilogy Redmond Ridge for an extended stay. (You may recall that my parents live on Adair Creek Way.) I will collect your journals by appointment and read through them. If you need more time to complete the journals, please let me know. I will be at Trilogy until July 23. About twelve of you will be selected to participate in an interview of about 90 minutes and an activity of your choice with me, giving us further opportunity to think about activity and for me to experience what kinds of things you do. I will try to select a diverse group in terms of gender, age, interests, etc. We will then collaborate on a survey for the wider Trilogy Redmond Ridge community about the kinds of things residents like to do and how they rank those things in terms of importance.

Please let me know if you have any questions. I have included a brief demographic survey for each of you that allows me to describe (anonymously) the group of people included in the study in terms of age, gender, employment status, race, etc. I am also including consent forms for you to sign that explain your rights as a research participant. You will each receive the small compensation of a \$25 gift card. At the moment, I am thinking of giving gift cards to The Pines Bistro, but I will happily provide alternatives for anything you might find useful. I am so pleased to be working with you, and I look forward to the results of the study!

Kind regards,

Becky De Oliveira

APPENDIX D

INSTRUCTIONS FOR THE ACTIVITY JOURNAL

## Instructions for the Activity Journal

These instructions appeared on the first page of the journal:

“Thank you for agreeing to fill out this journal for the next 14 days! Some people think recording what they do adds pleasure to the experience. I hope this is the case for you. You will see that each page has numerous numbered lines left blank for you to fill in brief names of activities. These can be anything you like—anything that you think of as an “activity.” Please do not feel that the number of lines indicates the number of activities you “should” do! There are no right or wrong answers here, and days can vary greatly in terms of activity.

“Next to the line are two columns containing check boxes: The first is location, giving you the option to indicate you did your activity at [insert community name] or at another location. The second asks you to rank your enjoyment of the activity on a three-point scale: 3 = enjoyed, 2 = neutral, 1 = did not enjoy. There is also space on each page for you to record other thoughts about your day—perhaps things you wish you had done but were unable to do. This is entirely optional.

“Thank you again, and I hope you have an enjoyable 14 days!”



APPENDIX E  
LAYOUT OF THE ACTIVITY JOURNAL

## Layout of the Activity Journal

This is how the activity journal will appear:

DAY ONE	Date: _____				
ACTIVITY	AT AARC		AMOUNT ENJOYED		
1. _____	Yes	No	3	2	1
2. _____	Yes	No	3	2	1
3. _____	Yes	No	3	2	1
4. _____	Yes	No	3	2	1
5. _____	Yes	No	3	2	1
6. _____	Yes	No	3	2	1
7. _____	Yes	No	3	2	1
8. _____	Yes	No	3	2	1
9. _____	Yes	No	3	2	1
10. _____	Yes	No	3	2	1
11. _____	Yes	No	3	2	1
12. _____	Yes	No	3	2	1
13. _____	Yes	No	3	2	1
14. _____	Yes	No	3	2	1
15. _____	Yes	No	3	2	1
16. _____	Yes	No	3	2	1
17. _____	Yes	No	3	2	1
18. _____	Yes	No	3	2	1
19. _____	Yes	No	3	2	1
20. _____	Yes	No	3	2	1

3 = Enjoyed; 2 = Neutral; 1 = Did not enjoy

APPENDIX F  
INTERVIEW GUIDE

## Interview Guide

1. Thank you so much for completing the thirty-day activity journal! I'll ask you some questions specifically about that a little later, but first I was hoping you could tell me a bit about how you came to live at [insert community name].
2. This community is an age-restricted active adult retirement community, eligible only to people over the age of 55. What are your feelings about living in an age-restricted community?
3. I have certain ideas of how I'd like to be as I get older, knowing that much of this is pure luck with health and other factors. There are certain people in my life that I see as "models" for the retirement portion of my life. Could you describe what your ideas about retirement have been or models you've had for how you'd like to be?
4. How did determine which things you put in your activity journal?
5. Can you give me a brief definition of what you think "activity" is?
6. How does activity now compare with other stages of life?
7. What is the role of activity in your life? What about for other people who live in this community?
8. Specific questions for each interviewee about their activity journal. Will vary based on the contents.
9. How has the COVID-19 pandemic influenced your activities over the past year?
10. As you may remember, part of my interest in doing this study is in finding out how to help older adults use their professional expertise and life experiences in research. What are your thoughts about helping researchers do research?
11. What would your ideal role be in helping a researcher do research?
12. How can researchers make your partnership fulfilling and worthwhile?

APPENDIX G

INSTITUTIONAL REVIEW BOARD APPROVAL



Date: 05/03/2021

Principal Investigator: Becky De Oliveira

Committee Action: **IRB EXEMPT DETERMINATION – New Protocol**

Action Date: 05/03/2021

Protocol Number: [2104025083](#)

Protocol Title: The Meaning of Activity for Older Adults in an Age-Restricted Retirement Community with a Methodological Focus on Participant Co-Creation of Research

Expiration Date:

The University of Northern Colorado Institutional Review Board has reviewed your protocol and determined your project to be exempt under 45 CFR 46.104(d)(702) (703) for research involving

Category 2 (2018): EDUCATIONAL TESTS, SURVEYS, INTERVIEWS, OR OBSERVATIONS OF PUBLIC BEHAVIOR. Research that only includes interactions involving educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures, or observation of public behavior (including visual or auditory recording) if at least one of the following criteria is met: (i) The information obtained is recorded by the investigator in such a manner that the identity of the human subjects cannot readily be ascertained, directly or through identifiers linked to the subjects; (ii) Any disclosure of the human subjects' responses outside the research would not reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, educational advancement, or reputation; or (iii) The information obtained is recorded by the investigator in such a manner that the identity of the human subjects can readily be ascertained, directly or through identifiers linked to the subjects, and an IRB conducts a limited IRB review to make the determination required by 45 CFR 46.111(a)(7).

Category 3 (2018): BENIGN BEHAVIORAL INTERVENTIONS IN CONJUNCTION WITH THE COLLECTION OF INFORMATION FROM ADULT SUBJECTS through verbal or written responses (including data entry) or audiovisual recording if the subject prospectively agrees to the intervention and information collection and at least one of the following criteria is met: (A) The information obtained is recorded by the investigator in such a manner that the identity of the human subjects cannot readily be ascertained, directly or through identifiers linked to the subjects; (B) Any disclosure of the human subjects' responses outside the research would not reasonably place the subjects at risk of criminal or



### Institutional Review Board

civil liability or be damaging to the subjects' financial standing, employability, educational advancement, or reputation; or (C) The information obtained is recorded by the investigator in such a manner that the identity of the human subjects can readily be ascertained, directly or through identifiers linked to the subjects, and an IRB conducts a limited IRB review to make the determination required by 45 CFR 46.111(a)(7). For the purpose of this provision, benign behavioral interventions are brief in duration, harmless, painless, not physically invasive, not likely to have a significant adverse lasting impact on the subjects, and the investigator has no reason to think the subjects will find the interventions offensive or embarrassing. Provided all such criteria are met, examples of such benign behavioral interventions would include having the subjects play an online game, having them solve puzzles under various noise conditions, or having them decide how to allocate a nominal amount of received cash between themselves and someone else. If the research involves deceiving the subjects regarding the nature or purposes of the research, this exemption is not applicable unless the subject authorizes the deception through a prospective agreement to participate in such research.

You may begin conducting your research as outlined in your protocol. Your study does not require further review from the IRB, unless changes need to be made to your approved protocol.

**As the Principal Investigator (PI), you are still responsible for contacting the UNC IRB office if and when:**

- You wish to deviate from the described protocol and would like to formally submit a modification request. Prior IRB approval must be obtained before any changes can be implemented (except to eliminate an immediate hazard to research participants).
- You make changes to the research personnel working on this study (add or drop research staff on this protocol).
- At the end of the study or before you leave The University of Northern Colorado and are no longer a student or employee, to request your protocol be closed. \*You cannot continue to reference UNC on any documents (including the informed consent form) or conduct the study under the auspices of UNC if you are no longer a student/employee of this university.
- You have received or have been made aware of any complaints, problems, or adverse events that are related or possibly related to participation in the research.

If you have any questions, please contact the Research Compliance Manager, Nicole Morse, at 970-351-1910 or via e-mail at [nicole.morse@unco.edu](mailto:nicole.morse@unco.edu). Additional information concerning the requirements for the protection of human subjects may be found at the Office of Human Research Protection website - <http://hhs.gov/ohrp/> and <https://www.unco.edu/research/research-integrity-and-compliance/institutional-review-board/>.



Sincerely,

A handwritten signature in black ink that reads "Nicole Morse". The signature is written in a cursive, flowing style.

Nicole Morse  
Research Compliance Manager

University of Northern Colorado: FWA00000784

2104025083



APPENDIX H  
CONSENT FORM



**CONSENT FORM FOR HUMAN PARTICIPANTS IN RESEARCH  
UNIVERSITY OF NORTHERN COLORADO**

**Project Title:**

The Meaning of Activity for Older Adults in an Age-Restricted Retirement Community with a Methodological Focus on Participant Co-Creation of Research

**Researcher**

Becky De Oliveira, Department of Applied Statistics and Research Methods  
Phone: 269-240-0349 Email: becky.deoliveira@unco.edu

**Research Advisors**

Maria, K. E. Lahman, Ph.D.; Department of Applied Statistics and Research Methods,  
E-mail: maria.lahman@unco.edu

Randy J. Larkins, Ph.D.; Department of Applied Statistics and Research Methods  
E-mail: randy.larkins@unco.edu

**Procedures:** I would like to ask you to participate in a research study to help me understand the meaning of activity for older adults living in a 55+ active adult master planned community, along with their thoughts on helping researchers do research. If you participate in this study, you will be asked to fill out a thirty-day activity journal. You may then be selected to participate in a face-to-face, Skype, or Zoom interview lasting approximately 90 minutes. This interview may be audio or video recorded, and the contents transcribed. You will not be anonymous, but neither will you be named in the final report. You will have the opportunity to check statements you have made for accuracy. The taped interviews and transcripts will be stored on a password protected computer, accessible only to the researcher. You may also be asked to participate in an activity with the research, and to assist in developing a survey for the community. There are no foreseeable risks involved in participating in this research beyond those encountered in everyday life. The results will help the researcher better understand the needs of older adults. As a small token of appreciation, you will receive a \$25 gift card,

**Questions:** If you have any questions about this research project, please feel free to contact Becky De Oliveira at becky.deoliveira@unco.edu (269-240-0349). If you have any concerns about your selection or treatment as a research participant, please contact Nicole Morse, Research Compliance Manager, University of Northern Colorado at nicole.morse@unco.edu or 970-351-1910.

**Voluntary Participation:** Please understand that your participation is voluntary. You may decide not to participate in this study and if you begin participation you may still decide to stop and withdraw at any time. Your decision will be respected and will not result in loss of benefits to which you are otherwise entitled. Please take all the time you need to read through this document and decide whether you would like to participate in this research study. If you agree to participate in this research study, please sign below. You will be given a copy of this form for your records.

Participant Signature

Date

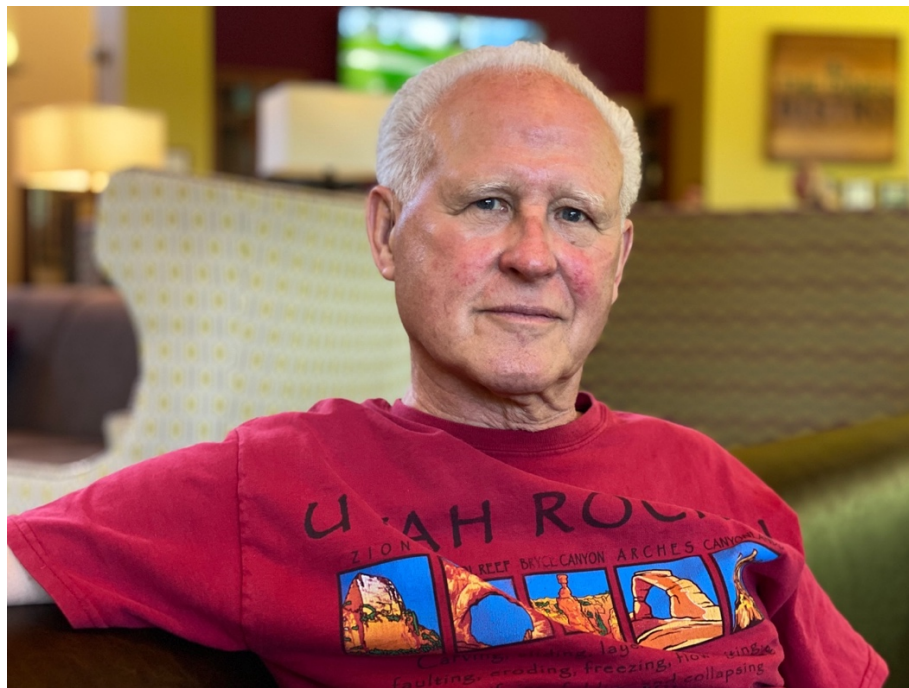
Investigator Signature

Date

APPENDIX I

PARTICIPANT AND COMMUNITY PHOTOS

### Participants at Sequoia Heights







### Community at Sequoia Heights















### Making Beer with a Research Participant





## Painting Purchased at a Sequoia Heights Charity Auction



## Sample Pages from August 2021 Activity Booklet

### Dice Teaser

Each space is occupied by a dice whose color corresponds to one of eight directions (up, down, left, right, and the four diagonal directions that lie between these.) Begin in the center space (the red two in this case) and each time you land on a dice, move the number spaces that is indicated by the dice and in the direction that is indicated by its color. You should never jump off the board and you should land on every dice, but only once.

Which is the last dice you land on?

### Wine Bottle Tiki Craft

**SUPPLIES**

- Empty Wine Bottle
- 1/2-inch x 3/8-inch copper coupling
- Teflon thread seal tape
- Tiki torch wick, 1/2-inch diameter
- Glass beads
- Citronella-scented tiki torch fuel
- Funnel

[https://www.ahow.com/how\\_12340110\\_make-mason-jar-citronella-torches.html](https://www.ahow.com/how_12340110_make-mason-jar-citronella-torches.html)

1. Remove the wine labels in hot, soapy water. Continue running the bottle under hot water, rubbing with your fingers or a scrubber to get the adhesive off.
2. Wrap tape around a copper coupling, which you can find in the plumbing section at the hardware store, this will be used to hold the wick in place in the wine bottle.
3. Insert a tiki torch wick through the coupling, with about 1/4 inch extending past the narrow end of the coupling.
4. Place glass beads in the bottle filling up to 4 inches. This will help with the weight of the bottle to not tip over.
5. Using a funnel, fill the wine bottle with tiki torch fuel up to the point where the bottle starts to narrow. Don't overfill the bottle, as the wick will displace some of the fuel.
6. Insert the wick in the bottle and press down firmly on the coupling to create a tight seal at the opening.
7. Allow a few minutes for the wick to absorb the fuel. You will know that the fuel has reached the top of the wick when the tip appears blue.





**Le Gran Prix de Trilogy**  
**Saturday, August 28th**  
**9:00 AM - 12:00 PM**  
**Crystal Room**

**\*Free Admission!\***

**Come join us for the Pinewood Derby!**  
**You must register your car to be able to race...registration is open from 9:00 AM to 9:30 AM only.**

For early participants, we will offer an opportunity to borrow a car and join the race. No entry fees.

Participation is for Members of Trilogy and their relatives...grandkids are encouraged to participate.

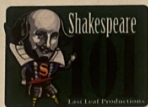
Prizes for the winning cars. Fun times are guaranteed!

Sign up at the Member Services desk so we know how many will be participating.


Questions? Please contact Walt Timpe at 425-503-9013



## *Shakespeare in the Park*



*Monday, August 23rd*  
*5:30pm-7:30pm*  
*Outdoor Back Patio & Lawn*



Four actors take the audience along with them on a fun sampling of Shakespeare's famous scenes as they learn, break down, and explore the diversity and flexibility of the works. Fun for novice and expert alike! This production is family friendly. Bring your friends, neighbors, and grandkids!

Bring your portable summer chairs or blankets for comfortable sitting in the grass areas...it is summer! We will have some chairs set up, but it will be on a first come, first basis. The performance will begin at 6:30pm and run for about an hour. Come at 5:30pm to get your spot and to socialize. You are welcome to bring snacks or a potluck with you.

**The cost is \$5 per person and checks can be made payable to Trilogy RCA. The deadline to sign-up is Friday, August 20<sup>th</sup>. Sign-up at the Member Services Desk.**