



# NAVIGATING LATER LIFE TRANSITIONS

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## AN EVALUATION OF EMOTIONAL AND PSYCHOLOGICAL INTERVENTIONS

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*Navigating later life transitions:  
An evaluation of emotional and psychological interventions*

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# EXECUTIVE SUMMARY

Group-based courses that provide psychological and emotional support for later life transitions can provide a range of benefits for the course participants. An evaluation of two such courses has demonstrated that following participation:

- Participants had improved wellbeing, self-kindness, attitudes to retirement and attitudes to ageing that were sustained for up to six months;
- Participants were clearer about their goals for the future in the areas of career, health, learning, finances, relationships, volunteering and hobbies;
- Participants took practical actions following the courses including talking to friends and family about their plans; doing more exercise, taking up a new hobby; speaking to their line manager about flexible working and seeking financial advice;
- Those with the greatest need showed the biggest changes, both in terms of improvement in self-kindness, wellbeing, attitudes to ageing and attitudes to retirement, and in improved goal clarity after the courses.

There are also potential implications for employers:

- Participants were very positive about what they saw as the support provided by their organisation for them to attend the courses and as evidence that they were valued. In this way, employers can become employers of choice and improve retention of their skilled older workers.
- A decline in job involvement among those with high levels of job involvement before the course suggests that people may be re-evaluating how they manage their work-life balance. As there is some evidence that very high levels of job involvement can lead to burnout, a decline can allow people to remain in work as productive members of their organisations.

## THE TRANSITIONS IN LATER LIFE PROGRAMME

Transitions in later life, for instance retiring from paid work, changing career, ending or starting a relationship, can have a major impact on people's lives and their wellbeing. Recognising a gap in preventative support for transitions such as these, the Calouste Gulbenkian Foundation (CGF; UK Branch) has funded a number of projects that provide group-based psychological and emotional support as part of its Transitions in Later Life (TiLL) programme. CGF and the Centre for Ageing Better partnered on the evaluation of two of these courses – Working Longer and Living Life to the Full, a two-day course run by Cheshire and Wirral Partnership NHS Foundation Trust (CWP) and Changing Gears, a three-day course run by Age & Opportunity in Dublin, Ireland. The courses employ a similar range of practices and techniques including: group dynamics to facilitate peer support and peer learning; therapeutic techniques for building resilience (drawing on mindfulness, cognitive behavioural therapy and meditation); reflective journals and life satisfaction audit tools.

The aim of the evaluation was to find out what impact the courses had on individual attributes that would help people be better prepared for later life transitions; what changes people make as a result of the courses; and what practice, resources or processes in the organisations are important in ensuring their implementation and efficacy. Because the two courses were similar, and because both were conducted in healthcare settings with highly homogeneous and similar sets of participants (90% female; average age of 56 years; almost half educated to at least degree level), the data from the two courses were pooled into a single evaluation.

## METHODOLOGY OF EVALUATION

The evaluation comprised quantitative survey data and qualitative interviews as follows:

- Survey questionnaires administered at four timepoints: before the course (baseline) and at 2 weeks, 3 months and 6 months after the courses. The questionnaires included bespoke questions and validated tools to provide insights on the key psychosocial outcomes of:
  - Self-kindness;
  - Wellbeing;
  - Attitudes to retirement;
  - Quality of social relationships;
  - Acceptance of change;
  - Self-judgement;
  - Attitudes to ageing;
  - Job involvement.
- At each data collection timepoint, participants were asked about how clear they now were about their future goals as regards their career, health, learning, finances, relationships, volunteering and hobbies.
- Participants were also asked whether they had done any of the following:
  - Talked to their line manager about options to work part-time or flexibly
  - Had conversations with friends/family about plans for the future
  - Had conversations with a partner/spouse about plans for the future
  - Started a new hobby/leisure pursuit
  - Sought professional advice about finances
  - Started doing more exercise
  - Changed their diet
  - Enrolled for any other courses.
- Semi-structured telephone interviews were conducted with 15 participants who responded to the survey at the 2-week timepoint.
- Interviews were conducted with project leads to understand the implementation of the courses and any changes to the courses that were deemed necessary.

## CHANGES IN GOALS AND ACTIONS

The courses had some clear short-term effects on goal clarity across the areas of career, health, finances, learning, relationships, volunteering and hobbies although, interestingly, it was greatest for finances: almost 60% of participants were clearer about their financial goals after the courses; and at the 6-month time point, 46% of participants were still clearer than they had been before taking part.

However, after the courses, around a third of people were less clear about their goals as regards their career, relationships and volunteering and more than 40% were less clear about their goals for learning or education. But this is not the same as “no change” for these goals. Rather, it suggests that the course is having the effect of causing people to think about things to which they had previously given little or no consideration. As such, a decline in clarity could be viewed as a positive outcome of the courses if it results in deliberation and contemplation that in turn produces changes in goals and actions.

People were also seen to take a variety of actions following the courses: the overwhelming majority went on to have conversations about their plans for the future with friends/family (75%) or with their partner/spouse (90%). Around 69% had started to do more exercise; 43% had started a new hobby or leisure pursuit; 32% had spoken to their line manager about options to work part-time or more flexibly and 40% had sought professional financial advice. This is an important finding - although the courses were aimed at emotional and psychological support for managing later life transitions - they appear to also have had the effect of prompting thinking and planning in a host of other, more practical domains.

## WHAT DIFFERENCES DID THE COURSES MAKE FOR PARTICIPANTS?

Both the survey and interview data revealed that the courses had a dramatic impact on participants' psychological characteristics, attitudes and outlook.

Almost three-quarters of participants had an improvement in **self-kindness** two weeks after the courses and this proportion had hardly changed at the 6-month time point.

For **attitudes to retirement** and **wellbeing**, the proportion of people showing an improvement actually increased as time went by: more than half (51%) of respondents had improved wellbeing right after the course but by the six-month timepoint, this had increased to 66%.

Following the course, 60% of participants had improved **attitudes to ageing**. This tailed off slightly over time but by the 6-month mark, 40% still had more positive attitudes to ageing than before they took the course.

For **job involvement** and **quality of social relationships**, most of the respondents showed a decline at each of the three time points after the course. Almost seven in ten participants reported feeling less involved in their job two weeks after the course. And although this figure dropped over time, half of all respondents still reported lower levels of job involvement at the 3-month mark right through until the end of the data collection period.

As for the observed changes in goal clarity, it is possible that the decline in job involvement reflects a re-appraisal of the role of work, leading to an improvement in work-life balance. An unhealthy and unsustainable work-life balance is of concern for workers in the healthcare setting can lead to illness and burnout. Indeed, the CWP course providers are keen to address this within their own organisation so as to ensure retention of skilled workers. With this lens, a decline in job involvement could be interpreted as improved work-life balance and is thus a positive outcome.

Similarly, post-course, the quality of social relationships had declined for at least half of respondents. But qualitative interviews suggest that this may be because, until the course, people had not thought about the nature and quality of their social relationships at all. As for goal clarity, this is suggestive of a process of reflection and re-evaluation.

In fact, reflection is a key element of both the *Working Longer and Living Life to the Full* and *Changing Gears* courses. The benefits of having an opportunity for reflection is a strong and recurring theme in the interview data: participants particularly valued the opportunity and support, from both the facilitator and their peers, to reflect on where they were in their lives and what they might want from the next phase. Ensuring enough time and space for these reflective practices is something that any future courses should build in.

## **WHO HAS THE BIGGEST IMPROVEMENTS?**

When course participants were divided into two groups – one comprised of people who had scores on each outcome that were in the top half prior to the start of the course and the other of people who had scores in the bottom half – it was apparent that a much higher proportion of those who went into the courses with the lower scores reported improvement following the courses (with the exception of attitudes to ageing) compared to those who started with the higher scores. For example, at the six-month time-point, almost 80% of those with lower wellbeing scores before the course had improved wellbeing compared with 50% of those who had the higher wellbeing scores before the course.

Patterns of job involvement are particularly interesting: of those with lower levels of job involvement before the course, almost 70% had improved levels of job involvement six months after the course, whereas of those with higher levels of job involvement before the course more than 60% had reduced levels of job involvement after the course.

We see the same patterns when we look at goal clarity: those who started with below median levels of clarity on any of the goals examined had much higher increases in goal clarity after the courses compared to those who started with above median levels. In short, the courses have the biggest impact on those with the greatest need.

## **BENEFITS FOR EMPLOYERS**

There are important benefits for employers too. Some participants reported feeling more valued by their organisation which led to a renewed sense of commitment to the organisation. It is possible that this is reflected in the observed improvements in job involvement among those course participants with the lowest levels of job involvement before the course. Clearly, improved job involvement among more disengaged workers is beneficial to employers and enables them to retain skilled workers. At the same time, poor work-life balance is an issue for many employees in the health sector. Losing employees to burnout runs counter to all attempts to retain skilled workers. So, the finding that the courses had the effect of reducing job involvement for the most involved workers should be of interest to employers too. With an ageing workforce, initiatives that enable employers to retain their skilled workers are critical.



NAVIGATING  
LATER LIFE TRANSITIONS

**FULL REPORT**

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# 1

## INTRODUCTION

Transitions in later life, whether this be retiring from paid work, changing career, ending or starting a relationship, can have a major impact on people's lives and their wellbeing. We know that some people flourish in the face of change and embrace the challenges and opportunities that they can bring. However, sometimes these transitions can be difficult, perhaps expectedly so. Current support for transitions in later life tends to be focused on the practical and financial aspects of retirement and fails to consider other forms of transition and/or the wider social, psychological, and emotional impact that transitions can have (see Robertson, 2014). Importantly, support is largely focused on 'firefighting' the effects of negative transitions, rather than prevention to mitigate the risk.

There are a small number of courses offering a broader approach (encompassing psychological and emotional wellbeing), but these are the exception rather than the norm. *Transitions in Later Life* (TiLL), a programme run by the Calouste Gulbenkian Foundation (UK Branch) 2014-2019, has sought to redress this by funding several projects that provide group-based psychosocial support for people who might be facing or contemplating some form of transition in later life. Funded projects differ in aims, content and delivery style, and target groups for participation, but they have in common an aim to facilitate a better 'transition into' later life, resulting in improvements in wellbeing that are maintained in the long-term, and providing resources to manage future life changes. A full list of funded projects is available in Appendix A.

This evaluation was co-commissioned by the Calouste Gulbenkian Foundation (UK Branch) and the Centre for Ageing Better, a supporting partner on the TiLL programme, to evaluate the extent to which these courses were able to deliver benefits for older people facing transitions in later life. The evaluation is of two of the courses that were funded under the TiLL programme: (1) *Working Longer and Living Life to the Full*, run by Cheshire and Wirral Partnership NHS Foundation Trust (CWP) and (2) *Changing Gears*, run by Age & Opportunity (A&O), an Irish national organisation which inspires and empowers people to live healthy and fulfilling lives.

## EVALUATION SCOPE

This Phase 2 evaluation took place from March 2019 until October 2019. It follows the Phase 1 evaluation of TiLL pilot projects, which was undertaken by independent consultancy Brightpurpose and published in 2017.

*Working Longer and Living Life to the Full* and *Changing Gears* were chosen for evaluation as they had the highest rates of participation and participant engagement with evaluation materials. Moreover, both had similar target groups, i.e. those working in healthcare settings. The data from these two courses were combined for the purposes of the evaluation. Unfortunately, due to a lack of participant data it was decided that the other courses funded under the TiLL programme could not be incorporated into the evaluation (see Appendix A).

Broadly, this evaluation intends to answer the following questions:

1. Why did people enrol on the courses?
2. What aspects of the courses did the participants find useful?
3. What activities, if any, did the participants engage in following the courses?
4. Did participation on the courses lead to a change in key outcomes?
5. Did certain groups appear to benefit more or less from participation on the courses?
6. What benefits, if any, were observable for the employing organisation?
7. Is it possible to identify specific aspects of the courses that lead to changes in key outcomes?

# 2

## COURSE DESCRIPTORS

### WORKING LONGER AND LIVING LIFE TO THE FULL

*Working Longer and Living Life to the Full (CWP)* is aimed at supporting CWP employees to plan for working longer while building individual resilience and looking after their physical and emotional wellbeing. It provides an opportunity for reflection on the emotional and psychological effects of ageing, and a space to explore how to manage change and make decisions.

It was run with CWP employees aged 50 and over at various locations across Cheshire and the Wirral within the Trust. Courses were delivered over two consecutive days. Nine of these two-day courses which took place during the fieldwork period were included in the evaluation.

The course is based on a wide range of practices and techniques, which include both individual tasks and group discussion to facilitate peer support and peer learning. According to the course materials the aims of the course are:

- To explore the significance of different life stages
- To introduce the concept of ageism and discuss the dominant stories in society about age and their effect
- To look at the process of transition and those transitions specific to later life
- To explore how to manage change and make decisions
- To explore the relationship between physical and psychological wellbeing and staying resilient
- To consider the importance of staying connected
- To identify each individual's strengths and development needs when planning for working longer.

The course is structured around 17 exercises (8 on Day 1 and 9 on Day 2) covering a wide range of activities ([Table 1](#)).

TABLE 1. Description of the activities on the 2-day *Working Longer and Living Life to the Full* course

| Exercise  | Activity  | Purpose  |
|---|---|--|
| <b>Introductory activity</b>                              | In pairs discuss why you enrolled on the workshop   | To demonstrate that we are all similar, but unique and to immediately have to listen carefully what others say   |
| <b>Reflective thinking exercise</b>                       | Sit comfortably and listen to the facilitator's verbal guides   | To think about life stages, past, present and future and give thought to how this makes you feel   |
| <b>Identifying life transitions</b>                       | Using post-it notes to list life transitions and add to flipchart   | To think about the Transition Process, change, endings and new beginnings and the emotional context of this  |
| <b>River of life exercises/Life transitions time line</b> | To complete the handout as instructed   | To reflect on the strength that you have demonstrated so far, drawing on the life transitions you have experienced. The changes, endings and new beginnings and what this means to us emotionally  |
| <b>Session on ageism</b>                                  | Listen and watch the Ted Talk by Ashton Applewhite  | To think about why getting older feels difficult. Does it feel difficult? How do you feel about your own ageing? What messages have you absorbed over the years? Do you speak up when you encounter ageist behaviour or attitudes? Do you recognise them?  |
| <b>Skills audit</b>                                       | Individually read the statements on the back of the cards and sort into four groups   | To reflect on individual skills linked to people, data, things and ideas. To think about how your skills can be applied during this period of your life to enable you to plan for and develop a fulfilling and purposeful later life   |
| <b>Finance session</b>                                    | The facilitator will share relevant information and as a group, if you feel able to do so, discuss your own experience.   | To think about: i) How long you can go on earning? ii) Can you fund the lifestyle you would like in later life? iii) What provisions have you made for life beyond employment? iv) What may you need to put in place? (to care for your ageing parents perhaps? OR in supporting your adult children?) |
| <b>Philosophy of life session</b>                         | In groups, share your thoughts about your personal philosophy of life.  | To think have space to think about 'the bigger questions' of life  |
| <b>Group discussion</b>                                   | What would be the word you would use to describe your feelings after day one of the workshop?   | To gain an understanding of how you experienced the first day and how you are feeling at the beginning of day two  |
| <b>Group discussion</b>                                   | As a group discuss ideas about personality and how we develop a sense of self. Think about what defines you in terms of difference and diversity.   | To think about the importance of understanding yourself and to think about what has shaped your personality, how do you relate to others, how would you describe yourself?   |
| <b>Personality Cards exercise</b>                         | This exercise, based on the Myers Briggs Type Indicator (MBTI), gives an insight into your predominant personality type, which are divided into 16 different ones                             | Identifying our predominant personality type can help us to understand: What motivates us, what stresses us and how we can support ourselves to be the best we can be.   |
| <b>Identifying individual drivers</b>                     | Individual, complete the Drivers questionnaire  | To look at what drives you and your behaviours. Is that 'driver' helpful or not so helpful? Has it served you well so far in life? Will it support you well in later life?   |
| <b>Relationships exercise</b>                             | Individually complete the relationships exercise. Think about the different relationships you have and how these support you.   | To look at the different kinds of support that you have and value. To think about how your relationships will support you in later life and to identify where you might need to strengthen your support system   |
| <b>Identifying areas for improvement in wellbeing</b>     | In pairs, discuss two things you can do in the next three months to improve your emotional and physical wellbeing and make a promise of action to support yourself in making this improvement | To identify an area for improvement and make a commitment to take action   |
| <b>Resilience exercise</b>                                | In groups identify ways in which you are demonstrating the four aspects of resilience.  | To think about how you respond to different events and to think about how you can learn from past responses and make changes to support you in the future  |
| <b>Personal goal setting exercise</b>                     | Individually, complete the goal setting handouts.   | To create specific, measurable, achievable, relevant and time-bound goals to support you in creating the future you want, so that you can live life to the full  |

## CHANGING GEARS

Changing Gears (A&O) aims to support people nearing retirement to carry out an audit of their lives, explore work-life balance, personal resources, support networks and strategies for promoting wellbeing and peace of mind. It provides an opportunity for reflection on the emotional and psychological effects of ageing, and a space to plan for a retirement that reflects their vision and choice.

The course was run with employees aged 50 and over in the Irish Health Service Executive (HSE). Five courses were delivered across Ireland in the following cities: Cork, Dublin, Galway, Kilkenny and Limerick. Courses were delivered in three 1-day non-consecutive sessions. The course is based on a wide range of practices and techniques, including:

- Group dynamics to facilitate peer support and peer learning
- Blended learning to develop the presentation and delivery of Changing Gears to the HSE
- Therapeutic techniques for building resilience (drawing on Mindfulness, CBT, Meditation)
- A reflective journal to promote the use of reflective learning
- Life satisfaction audit tools for use in the group and after the course has finished
- A single follow-up action by each participant targeting a personal goal to be achieved within three months (this goal is posted to participants three months after the course).

The course is structured around 16 exercises covering a wide range of activities ([Table 2](#)).

**TABLE 2. Description of the activities on the 3-day *Changing Gears* course**

| <b>Exercise</b>                                      | <b>Activity</b>   | <b>Purpose</b>   |
|--|---|--|
| <b>Personal coat of arms</b>                         | Filling in a blank template of a coat of arms: detailing four aspects of your life and sharing it in small group sessions. The four aspects are: 1 Where I come from and where I live now. 2 My interests/hobbies. 3 Roles I have been involved in. 4 Something interesting about me that I'm happy to share.   | This exercise is an ice-breaker. We use it to help group formation and to introduce the model of small group sharing. This takes place after the group agreement which usually contains agreements about confidentiality, respect for each other and agreeing to listen well.  |
| <b>Learning more about me: Personality types</b>     | This exercise was designed by a colleague in Third Age. It is not a verified psychometric test and as such we introduce it in a light-hearted way. It has proven to be very accurate in helping participants to identify their most dominant personality traits:<br><br>Type A: Practical/resourceful<br>Type B: Business-like/managerial<br>Type C: Creative/artistic<br>Type D: Social and caring<br>Type E: Methodical/systematic. | This exercise allows participants to reflect on personality; how personality type shapes our past and the opportunities and challenges it presents for the future (particularly in terms of building resilience in transition).<br><br>Participants often remark on how accurate the test is.                                    |
| <b>River of life</b>                                 | Participants use the diagram to identify significant moments in their lives. Happy/positive events are posted above the line and challenging/difficult events are posted below the line.  | Participants reflect on how life has been so far and what they have learned from it; how events have contributed to resilience or challenged it.   |
| <b>Transitions event questionnaire &amp; handout</b> | The previous exercise leads into the Transitions event questionnaire and theoretical model.   | This exercise is usually at the end of session two. It offers a model for understanding different aspects of life transitions (characteristics, phases, impact, influences) and strategies for managing them.  |
| <b>Resilience work sheets</b>                        | Various worksheets which explore resilience from different angles.  | These worksheets encourage participants to tease out their understanding of resilience in terms of personality (identifying myths about resilience; factors which help or hinder becoming more resilient). It is important that participants appreciate that resilience is not a trait but a skill that we can learn to develop. |
| <b>Wheel of life</b>                                 | This is a life audit tool based on a life-coaching exercise.  | We suggest it is beneficial to carry out this audit on an annual basis: it allows us to see which areas of our life give us more satisfaction and which areas are the source of anxiety or stress, and how this can change over time. It also facilitates priority mapping.  |
| <b>Circle of friends</b>                             | This personal map & accompanying worksheet is taken from <i>The Rainbow Years</i> (Barry Hopson).   | By reflecting on 14 different scenarios in life, participants identify strengths and weaknesses in their support/friendship network. It allows them to acknowledge gaps or recognise if they are overly dependent on one or two people.  |
| <b>Ageing / retirement questionnaire</b>             | Worksheet addressing personal aspects of ageing or retirement.  | This exercise enables participants to explore the link between positive ageing and resilience, countering unhelpful myths and stereotypes about ageing/retirement.   |
| <b>Labyrinth</b>                                     | A meditative exercise, which we were introduced to by colleagues from the Centre for Policy on Ageing. It can be adapted to accommodate different situations, although access to outdoors is preferable.  | Participants are allowed time and space to explore three key questions (What do I want to let go of at this time of my life? What do I want to be at the heart/ centre of my life? What do I want to pick up for the next phase of life?)  |
| <b>Transferable skills</b>                           | This activity taken from <i>The Rainbow Years</i> . It is an exercise where participants identify their most transferable skills.   | Inviting participants to identify their most transferable skills under four categories (Data, Ideas, People, Things) allows them to think about types of work/volunteering that could utilise those skills.  |

*Table continued overleaf*

|   |   |  |
|---|---|--|
| <b>Mid to later life review</b>             | This was adapted from Jane Watts Mid-Life Career Review.  | This exercise helps participants to plan for the next phase of life, by identifying key priorities and concrete support / strategies needed to make them happen. |
| <b>Resource network</b>                     | Participants map different resources available to them in terms of usefulness and priority.                     | Allowing participants to further explore the concept of resilience in terms of access to/ utilisation of particular resources.                                   |
| <b>Four planning types</b>                  | This is a video we developed as part of the MOOC "Strategies for Successful Ageing".                            | It introduces four planning types from SMART, Rewind, Question Planning and Intention Planning. Its purpose is to be a tool for focused planning.                |
| <b>Cultivating optimism</b>                 | Group discussion on ways we can cultivate optimism.   | The key message is that optimism, like resilience, is a skill that can be learned.   |
| <b>Writing a card to myself</b>             | Participants write a card to themselves which A&O posts to them in three months' time.                          | This is about short-term goal setting. The card acts as a reminder to the participant of what they had hoped for/planned while doing the course.                 |
| <b>Board game: Your money and your life</b> | Board game with individual profiles, each participant starts with differing amounts of money and Peace of Mind. | To creatively explore the connections between money, happiness, personal choice and peace of mind. Useful for planning for the next phase.                       |

## STUDY DESIGN

Survey data was collected at four different time points: at baseline before the courses started (T<sub>1</sub>) and two weeks (T<sub>2</sub>), three months (T<sub>3</sub>) and six months (T<sub>4</sub>) after the end of the course. In addition, 15 qualitative semi-structured interviews were conducted with participants who responded at T<sub>2</sub>. These were carried out within four months of the end of the course. See Appendix E for more details on methodology.



# 3

## WHO TOOK THE COURSES?

Data from the *Working Longer and Living Life to the Full* (CWP) and *Changing Gears* (A&O) courses were combined for this evaluation. Participants across the two courses formed a homogenous sample (**Table 3**): 90% of the sample were female and 98% identified as White. The majority of the sample (63%) were married or in a civil partnership. As one would expect from this occupational sector, this was a highly educated sample. Almost half (48%) were educated to at least degree level. This was also a fairly healthy sample: 41% reported their health as good, 31% as very good and 10% as excellent. However, 15% said that their health was only 'fair' and 3% that they were in poor health. The average age of the participants was 56 years.

**TABLE 3. Socio-demographic characteristics of the sample**

|   | %     |
|---|-------|
| Female  | 90.59 |
| Male  | 9.41  |
| White   | 97.65 |
| Non-White   | 2.35  |
| Never married and never registered a same-sex civil partnership                     | 15.03 |
| Married or in same-sex civil partnership  | 62.75 |
| Separated, but still legally married or in same-sex civil partnership               | 5.88  |
| Divorced or formerly in a same-sex civil partnership which is now legally dissolved | 12.42 |
| Widowed or a surviving partner from a same-sex civil partnership                    | 3.27  |
| Education lower than degree level   | 52.03 |
| Educated to degree level or above   | 47.97 |
| Excellent health  | 9.68  |
| Very good health  | 30.97 |
| Good health   | 41.29 |
| Fair health   | 14.84 |
| Poor health   | 3.23  |
| N   | 157   |

## REASONS FOR TAKING COURSE

We asked respondents what their main motivation was for attending the course. It is clear from the results (Table 4) that there were three main reasons for taking the course: to receive information about how to manage later life transitions (83%), for personal development (70%), and to prepare for retirement (70%). The other motivations, such as stress reduction, pension information and support for longer working, were relatively marginal in comparison. This strongly suggests that the advertising for the course was successful in communicating the aims of the course and attracting those who were interested in psychosocial support for transitions in later life as opposed to more traditional pension advice, for example.

**TABLE 4. Reasons for taking the course†**

|  | %     |
|--|-------|
| <b>To receive information about how to manage later life transitions</b>           | 82.80 |
| <b>For personal development</b>  | 70.06 |
| <b>To prepare for retirement</b>   | 70.06 |
| <b>To learn how the organisation can support me to continue to work for longer</b> | 38.22 |
| <b>To learn about pensions</b>   | 35.67 |
| <b>To reduce stress</b>  | 31.85 |
| <b>Because others recommended it</b>   | 29.94 |
| <b>To have time away from the office/ward</b>                                      | 13.38 |
| <b>To meet colleagues</b>  | 10.19 |

† Percentages can add up to more than 100 as respondents could choose multiple responses; N=157

These figures correspond with what the respondents told us in the interviews we conducted. Respondents were clear that they were attracted to the course as it seemed to provide something different from the usual retirement planning courses that focused more on financial planning:

*Erm it was more curiosity because I'm getting, I mean I turn 60 in January so I'd sort of formulated some ideas of what of the future, what I wanted the future to be sort of like erm and I think it was more sort of reinforced to me that I was thinking along the right track and was there anything that I hadn't thought of that perhaps I should be considering (CWP)*

*I thought that the programme was very relevant, I felt that the way it was promoted, it was described erm as helpful. Er it was promoted in a positive way. Erm the fact that it was held locally and the fact that it was away from work. (A&O)*

*So what I was wanting to get from this course primarily was – it wasn't a specific thing, it was more about me getting my head in the game really, you know, because on a day to day basis you're so busy at work. I've set this date to retire and I wasn't really, you know, I was just kind of hurtling towards it. So thinking I needed to give that a bit of thought, I thought this course would allow me to start that process and get my head in that game so that I could kind of have a list of what I needed to do and think about and all the rest of it. (CWP)*

Some participants were drawn to the courses for guidance when at a crossroads in their lives and wanting to make decisions about their futures:

*It was actually the name of the course [Changing Gears], I guess because I drive for work, I see people in their own homes, it, it very deeply resonated with me in terms of oh my lord, I do have to change down a gear and just acknowledge that I don't maybe erm have the same oomph to go the way I used to 20 years ago. So for that reason it, it, it jumped off, off the screen at me. Erm and I've been in the job a long time and I thought well, you know what, this is a good time to stand back and take stock. (A&O)*

*Well, I'm just about to turn 56 and so retirement's kind of in the pipeline. I was sort of considering whether to go earlier or whether to put it off for a bit longer, so it's really to consider my options with a view to retiring. (CWP)*

# 4

## COURSE ASSESSMENT

### ASSESSMENT OF THE COURSES AS A WHOLE

Participants rated the courses very positively ([Table 5](#)) indicating that the organisers have done an excellent job in the preparation, structuring and delivery of the courses.

**TABLE 5. How participants rate the course at T2 (%)**

|  | Strongly disagree/<br>Disagree | Neither agree<br>nor disagree | Strongly agree/<br>Agree |
|--|--------------------------------|-------------------------------|--------------------------|
| The facilitator provided clear guidance for the course exercises                       | 0                              | 0                             | 100                      |
| What I had to say was taken seriously  | 1.28                           | 1.28                          | 97.44                    |
| The content of the course was well organised   | 1.28                           | 2.56                          | 96.15                    |
| Taking this course was worth my time   | 2.56                           | 5.13                          | 92.31                    |
| I would recommend this course to my co-workers   | 3.84                           | 3.85                          | 92.31                    |
| Being able to discuss issues with the group as whole was important                     | 3.84                           | 7.69                          | 88.46                    |
| I benefited from working in small groups with other participants                       | 5.13                           | 7.69                          | 87.18                    |
| The room and facilities were adequate and comfortable                                  | 7.69                           | 6.41                          | 85.89                    |
| The course helped me to prepare for transitions in life                                | 3.84                           | 12.82                         | 83.27                    |
| I was able to immediately use what I learnt in the course                              | 5.13                           | 19.23                         | 75.64                    |
| I do not have the necessary resources to apply what I learnt on the course             | 80.77                          | 3.85                          | 7.7                      |
| I don't think what I learnt will work for me   | 84.61                          | 7.69                          | 6.41                     |
| I did not feel that I was able to participate in the activities as much as I wanted to | 89.75                          | 5.13                          | 5.13                     |
| I did not feel safe to participate in the discussions                                  | 87.18                          | 5.13                          | 5.13                     |

These statistics are borne out by what the respondents told us during the interviews. As can be seen from the following quotes, respondents were very positive about the course as a whole and the way in which it was delivered:

*I liked the atmosphere, the way it was set up and you know there was talking and yet there was enough structure. Like initially when I arrived it was a little slow, you know, the way things happen and the way it's set up and everything and I thought oh god, is this going to be it. But in fact no, it moved along and we got through everything we wanted to get through each of the days. So I liked that, I liked the fact that we got some resources, that I will go back over again so we got that book, how to age positively er we got some erm you know, some various exercises which we can do again, you know, that type of thing. (A&O)*

*I thought it was very good because what they seemed to encourage was group discussion and when a discussion did get going they weren't trying to sort of erm quicken the pace so it wasn't a case of saying, you know, we need to bring this to a halt because we've got all these things to get through, they would allow us to talk for as long as we wanted to more or less really. You know, if there was something that was quite a hot topic in the room they'd allow that to erm be fully discussed. So they went with the flow. (CWP)*

*It was excellent. [Course providers] they were very, very good, they complemented each other really well erm it ran at a good pace erm there was a lot of opportunity for people to erm talk, you know, offer their opinion, ask questions erm reflect on some of the things that they, that [course providers] were covering. Erm yeah, yeah, it was good, one of the best courses I've ever done. (CWP)*

*So it, it was a very positive day, and I came away all excited and stuff. So I guess that, yeah, that was well, that was the thing I was least expecting really. I thought it would just be another day where we plodded and waded through it but actually it was really enjoyable and nice and I came away feeling great. (CWP)*

*But it was very enjoyable, so there was lots of participation and it was very engaging. The two people that facilitated the course were very engaging and very, you know, I was going to say sympathetic, that's the wrong word, empathetic. You know. It was a very good couple of days. Glad I did the course. (CWP)*

*Do you know, I think the difference really was actually the facilitator, and the personality, you know, and the guidance and support through it and I think if you hadn't had that it wouldn't have had the same impact. It may not have. You know, the content is great, but it's how it is delivered obviously you know, and that was done really, really well (A&O)*

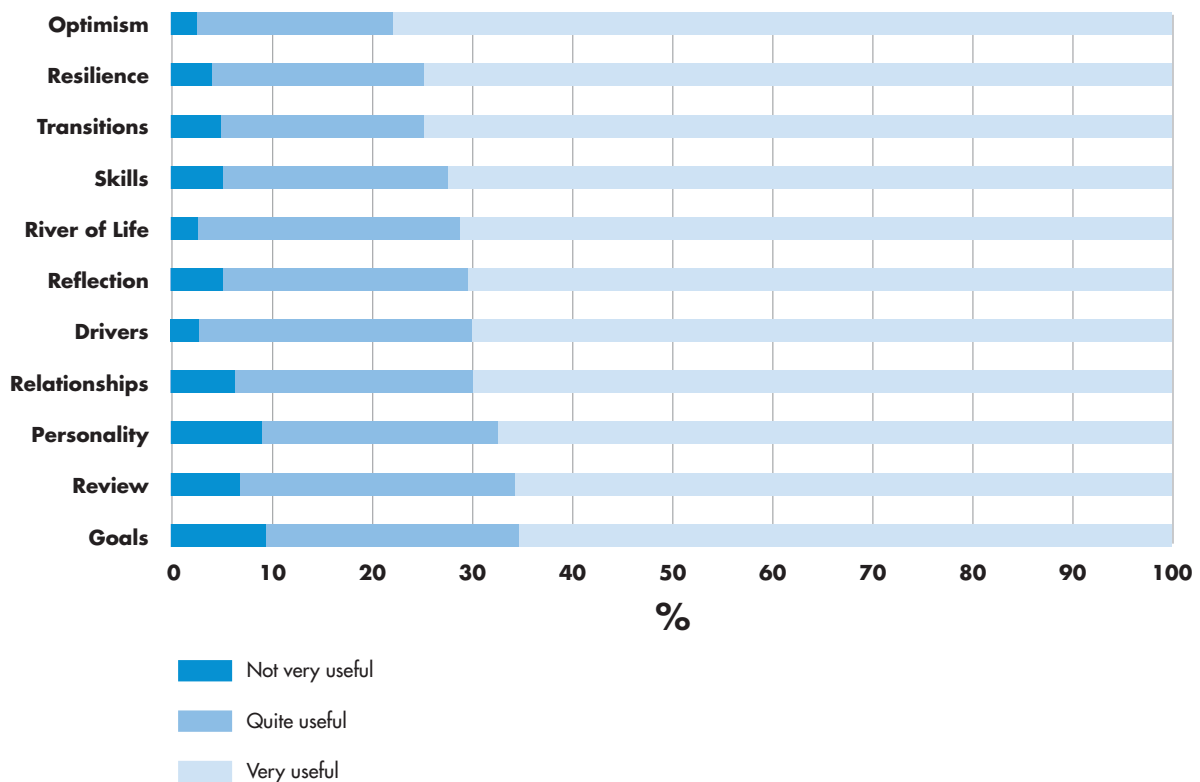
*So er they were, I think, easily the best course I was at in a very long time, they were just amazing facilitators. They seemed to have a wealth of knowledge and a wealth of references maybe in terms of books or in poetry, they just had a wealth of references to back up everything they said. They were amazing. (A&O)*

## EVALUATION OF THE SPECIFIC COURSE EXERCISES

Alongside the general evaluation of the course and its delivery, funders and course providers were keen to understand what participants felt about individual course components. However, as each of the two courses contained slightly different activities, we have had to focus on those activities that were common across both courses. For example, in the CWP course there was an activity called 'Identifying life transitions', and in the A&O course respondents were asked to complete a 'Transitions event questionnaire'. Because these activities were similar in content and aims, we combined the evaluation of these activities to form a new variable called 'Transitions'.<sup>1</sup>

At the first follow-up (T2), two weeks after the end of the course, respondents were asked "Please could you let us know how useful you found the following parts of the course."<sup>2</sup> As can be seen in **Figure 1**, participants were very positive about the individual course components, with around two-thirds reporting that each of the activities was very useful. Very few participants (between 3% and 9% depending on the exercise) rated any of the activities as not very useful.

**FIGURE 1. Evaluation of the course exercises**



N: 75-80 (depending on the activity)

1. Appendix D gives full details of the different activities from the two courses that were combined  
 2. The responses were grouped into "Not very useful" (response options: not at all useful or not very useful), "Quite useful" and "Very useful" (response options: very useful or extremely useful)

The results of the survey data are borne out by the qualitative data. A number of individuals were able to identify specific activities from the course that they found useful:

*Yes, I liked [the skills audit] actually, I liked that quite a lot. I'm quite visual in the way I work erm I liked the Myers-Briggs that we did on the second day I think. I've done Myers-Briggs before but it'd been many years and what I liked about it is that it said the same thing again [laughs]. Erm but I erm yeah, I liked that, I thought that was helpful for me to sit where I am and think. Of course I have a fairly high level of self-awareness, I have done Myers-Briggs, I have done Thomas Kilman, I have, you know, we'd literally just been put through a new development centre for this course, these new jobs that included looking at our kind of key behaviours and stuff. Erm but I think what I got from that is I know myself, you know, and I think it's, it's good to have that reinforced that actually yes, it is what I thought it was gonna be. (CWP)*

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*There was, like, the card sorting and then there was, there was a kind of table log within the handouts as well that I suppose followed on from the card sorting, and I found that really helpful. It wasn't particularly telling me anything that I didn't know already but, you know, it was stuff that I know but was floating around in the ether whereas it was quite a good way to specifically think about those things, and like crystallise, you know, the thinking a little bit, so I found that really helpful. (CWP)*

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*[Myers-Briggs] sort of exercises were very good and also it sort of normalised for me, and I think for others, the anxieties you feel in the run-up to retiring or possibly retiring. It was very like-minded people. It was a good space to talk. (CWP)*

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*We had lots of different exercises where we wrote a letter to ourselves, you know, that he afterwards posted out to us and that was really good because I had by the end of it made those points, not something I'd normally do to be honest, and when I got the letter I had started acting on three things that I had in that letter to myself and followed through, which is unusual for me now I have to say. (A&O)*

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*We did the labyrinth [...] that was amazing, I actually do that at home now, since, when my head is wrecked, I go out and I do that. (A&O)*

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*We had to write a letter, a card to ourselves. This was amazing only because I'd written down I wanted to do something about my job and the very morning I was going out for my interview this card came in the post! (A&O)*

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However, it is also worth noting that for a number of respondents the value of the course was in its totality rather than because of specific activities.

*I'd say it's probably the one course I've done that's had that kind of impact on me, being very honest. I thought [the course leader] was exceptionally good, you know, I really did. I think he had a lovely personality for it and I felt that he was very kind of open, even, in stories of himself. (A&O)*

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*You did ask me what was the stand-out bits of the course erm it's difficult to say, just looking at what the different things were [looks through materials]. I mean I think all of the course was interesting erm it'd be very difficult for me to put one over the other. I suppose anything that made me sort of reinforce that I was making the right decision winding down. Yeah, so the section on that, on the opportunities for erm changing your working habits. (CWP)*

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# 5

## COURSE IMPACT

### UPTAKE OF ACTIVITIES SINCE THE COURSE

We were interested to know whether respondents had started any new activities following the course. In the follow up questionnaires at T<sub>2</sub>, T<sub>3</sub> and T<sub>4</sub> we asked whether participants had done any of the following activities:

- Talked to line manager about options to work part-time or flexibly
- Had conversations with their friends/family about plans for the future
- Had conversations with their partner/spouse about plans for the future
- Started a new hobby/leisure pursuit
- Sought professional advice about their finances
- Started to do more exercise
- Changed their diet
- Enrolled for any other courses.

Instead of reporting the proportion of participants who took up these activities at each follow-up, the analysis shows the proportion of participants who have undertaken these activities at any time during the entire 6-month follow-up period (Table 6). This is because when we looked at the results at the 3-month (T<sub>3</sub>) and

6-month (T<sub>4</sub>) timepoints, we found large numbers of people who reported that they had not undertaken the activity or did not need to do so. When we examined this further, we found that these were people who had already said that they had done the activity in a previous wave of data collection. For example, if someone reported that they had started a new hobby or leisure pursuit shortly after the course finished, i.e. at T<sub>2</sub>, then it is unlikely that they would have started another new hobby between T<sub>2</sub> and T<sub>3</sub>. Hence, at T<sub>3</sub> they reported that they had not done this or did not need to do so. This gave a false impression that people were not doing these activities or were ceasing to do them, when in fact it was because they were already doing them. Therefore, to get a better idea of the proportion of people who started these activities following the course we excluded those who said that they did not need to do the activity in question.

As can be seen, there is a good deal of variability in the uptake of these activities following the course (Table 6). The overwhelming majority of respondents reported that they had had conversations with friends/family (75%) or with their partner/spouse (90%) about their plans for the future since they had been on the course. Interestingly, around 69% had started to do more exercise; 43% had started a new hobby or leisure pursuit, 32% had spoken to their line manager about options to work part-time or flexi-time and 40% had sought professional financial advice. This compares favourably to the 10% of the UK population that took financial advice in 2018 (Farr et al, 2018).

**TABLE 6. Proportion of respondents (%) who have undertaken new activities since the course**

|   | Yes   | No    | N   |
|---|-------|-------|-----|
| Had conversations with your partner/spouse about plans for the future           | 89.66 | 10.34 | 87  |
| Had conversations with friends/family about your plans for the future           | 75.24 | 24.76 | 105 |
| Done more exercise  | 68.60 | 31.40 | 86  |
| Started a new hobby/leisure pursuit   | 43.36 | 56.64 | 113 |
| Sought professional advice about your finances                                  | 39.83 | 60.17 | 118 |
| Talked to your line manager about options to work part-time or flexible working | 31.58 | 68.42 | 76  |

When considering these findings, it should be noted that for some of these activities, we had already excluded a significant number of people who did not think they needed to make any change. For example, we only included 76 people in the analysis of whether someone talked to their line manager as many participants reported that they did not need to talk to their line manager about flexi- or part-time working. Perhaps this is because they had already had these conversations or were already working on a flexi- or part-time basis. Hence, we should be cautious when interpreting these results as clearly there are areas where people already feel that they are on the right track. It should also be noted that the data was collected over a 6-month period after the course finished. It is possible that some of these activities, e.g. talking to a line manager or enrolling for other courses, were not pressing concerns during this period and could form part of longer-term plans for participants.

A third of the sample approached their line manager to discuss their working hours. It is clear from the interviewees that for those who had done this, it was a positive step for them. As they say, the course had given them the confidence to approach their line manager and successfully negotiate a reduction in their hours:

*So prior to sort of, towards the, as last year was going and I was sort of thinking well, I don't really want to stop working as soon as I get me pension but there again it might be time to ease back a little bit and start thinking about when I wanted to stop. So since the course I've put in a request to reduce my hours, which with a bit of negotiation has been agreed, it's not, we've not started that yet because they're erm they're gonna be advertising for a backfill to my post but I'm gonna be job sharing with somebody else in the office, that's been agreed. (CWP)*

---

This person acknowledged that it was the course that had given them the confidence to request reduced hours “because it was more of a recognised move for staff, I found out from the course” (CWP). The possibility that it is still too early in the process for respondents to have started making changes, but may do so at a later time, is evident in the interviews collected. We came across an example of this in the following interview when discussing the quality of social networks:

*Participant: But what that led to was an exercise in sort of paring down names in the frame for who are our, who's our network effectively, who might I contact for discussing something, you know, their advice, who might I contact to go out socially with or this, that and the other. And I very quickly realised that there's probably only about 4 or 5 people that I use across a various spectrum and beyond that it's just by chance if I happen to meet somebody. Erm and I thought well yeah, it's sort of a recipe for loneliness in old age so at the time I thought well yeah, what I probably need to do is get off me backside, join a few clubs if I'm retiring, like a walking club or something, or a gym, a social club so that I expand my contacts.*

*Interviewer: And have you done that yet?*

*Participant: No [laughs]. It sounds good on the course then you finish the course and I revert back to me sort of normal mode of being a bit of a loner. But I'm sort of saying to myself well I haven't reached that point yet where I'm retiring so it's something I need to be, as I'm getting nearer that, I need to consider more and when I drop me hours I might have more time. (CWP)*

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Thus, there may be lower than expected uptake in activities because people have decided they are not pressing matters and can be returned to when closer to retirement:

*Yeah I mean I think some of the goals that I sort of set out erm I don't know how realistic they are, they're, they're certainly achievable, it's whether I have the desire to do it. So one for example was consider occasional short breaks so this is like going for a weekend away and this, that and the other. But then you come away from the course and you sort of think well, do I really want to do this or are we doing this this weekend or yeah. Erm so and devise options for new hobbies. Well yeah, maybe when I reduce me hours I might get into that but I'm probably more likely to just carry on doing the things I like at the moment so it's just a matter of I didn't have any particular pressing goals so I just, I wrote, well I had to write something down [laughs]. (CWP)*

*I'm not sure I feel any different for taking on challenges, perhaps, it's perhaps given me more food for thought as to erm things like maybe I do need to expand my horizons a bit for me own wellbeing. Erm so in that sense it's probably given me the push to do things. (CWP)*

Other participants already had plans to enrich their personal lives and taking the course provided the impetus to enact those plans:

*I found it useful in kind of nebulous ways that, you know, weren't specific things but were just helpful in terms of, yeah, kind of drawing the line in the sand that this is not that far away now and, you know, we've gone from thinking about it to putting actions into place to make it happen, and just that, it was a step in that direction really that I found really helpful. (CWP)*

*I'm planning to sign up to a music appreciation course, which is actually only a night time hour, once a week but I think if I was to take it seriously it would mean at least a bit of work and hopefully pleasant and enjoyable work erm reading up and you know doing various things. (A&O)*

*I've joined a book club [...] I joined U3A, University of the Third Age [and] I started an aqua-zumba class. (CWP)*

Only the CWP course had a financial matters module. Although this was just a minor part of this course, it had great impact on some participants and encouraged them to take action. This ranged from having conversations with partners to arranging powers of attorney:

*So, so, for me that's what came out of the course for me, some of the practical things actually that I thought well I don't need to do it yet, realising actually you do, you need to just get on and get it done. So we've started doing it. So it's that kind of thing really that was quite useful for me. (CWP)*

*Erm I think all of the practical stuff, all of the stuff around making me think about power of attorney, do I know all about all of the bank accounts, does my husband know about all the bills, the practical stuff was useful. Because what it's helped me to recognise is that I can't put that off, which is what we were doing, well it wasn't as if we were putting it off, we just hadn't discussed it, it hadn't entered our heads that actually we need to do something about this. (CWP)*

*One of the things we considered, kind of hit a bit of a stumbling block, was to increase my pension contributions, but we've had a bit of a hiccup about that as they've said I don't do enough hours to increase my pension contribution or the amount we had in mind. So that's still in the pipeline, I've still got to sort that out, but that came as the result of, you know, some things that were discussed at the course. So, it is a work in progress, but you know, I have taken away from the course. (CWP)*

## CHANGE IN PSYCHOSOCIAL OUTCOMES

As well as looking at whether participation in the course led to behavioural change, e.g. the uptake of activities, we were also interested to see if it had an impact on people's attitudes and wellbeing. In the discussions with the course providers and the funders, we identified a number of key psychosocial outcomes for the evaluation.<sup>3</sup> These were:

- Self-kindness
- Wellbeing
- Attitudes to retirement
- Quality of social relationships
- Acceptance of change
- Self-judgement
- Attitudes to ageing
- Job involvement

The results (**Figure 2**) show that there may be some long-lasting effects on key outcomes for the course participants. A majority showed a large improvement in self-kindness (71%) and this remained relatively stable until final follow up (67%). In addition, 51% of respondents showed an improvement in wellbeing shortly after taking the course with a further increase to 66% at T4. The positive impact on wellbeing is manifested as increased confidence to make decisions and in optimism for the future: one participant speaks of her sense of empowerment following the course:

*It's made me very positive, very optimistic, very empowered erm excited, oh give me a thesaurus I tell you, I can't think of enough! It was fabulous, best course in the last 10 years. (A&O)*

This empowerment led to some participants making major decisions to improve their lives. For example:

*Participant: I feel they gave us a good grounding and they certainly whetted my appetite. I think that they restored my confidence to the point where I actually did an interview, I went for another job, which I think I wouldn't have felt I had the confidence to do prior to that.*

*Interviewer: Ok and you think you wouldn't have done that before taking the course?*

*Participant: Definitely not. I would've thought myself too old, too, what shall I say, that I should be looking to retirement instead of looking for another challenge. (A&O)*

*What the course helped me to do was recognise that I wasn't happy in the job I was in, so I've got a new one. (CWP)*

*[The course] just gave me the confidence to go and apply for another job and I think certainly I wouldn't have done that prior to the course, prior to both the course itself and the people I met at it gave me the confidence to do that. [I was looking for] a new challenge, just kind of feeling that I was in a bit of a rut, the same thing for 13 years and I had more to give still. (A&O)*

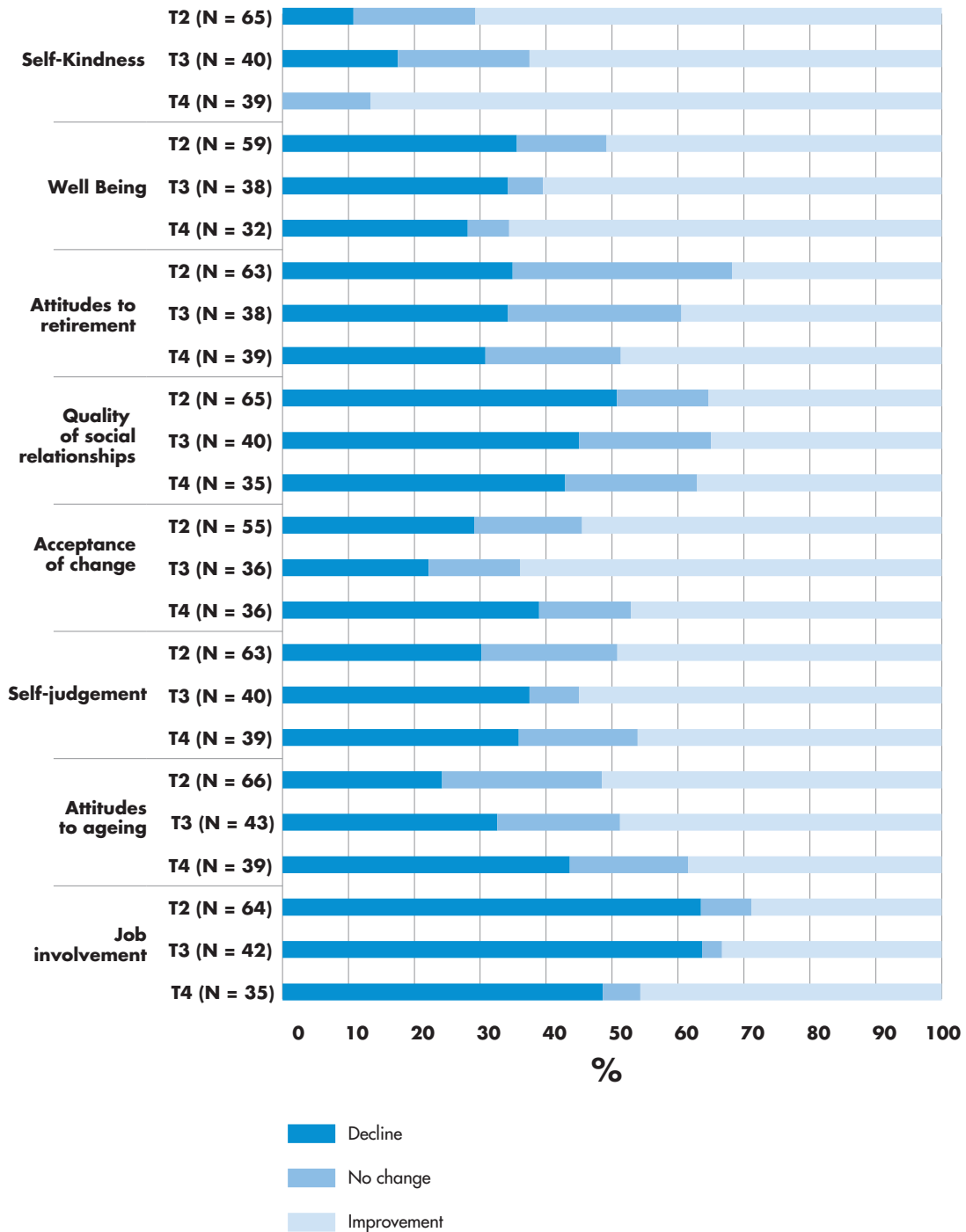
Approximately equal proportions of people showed improvement (32%) and decline (35%) in attitudes to retirement at T2. By T4, this had shifted, with a significantly larger proportion showing improvement (49%) than decline (31%). These patterns are reflected in the qualitative data we collected. Several respondents reported that the course had helped them to think more positively about the retirement transition and encouraged them to start making preparations:

*I found it quite useful. It put a very positive focus on working longer and you can do the two, you know, you can still work but also have some down time. But not to be scared off when you do make the decision to retire. It can be a new beginning rather than an end, you know, an end to your working life. (CWP)*

*Well, I suppose the difference is I'm more directed now as to what I need to do to prepare, and as I said I've already started that, you know, and they're not even, they're not related to work, they're related to outside work, you know. Things I need to do to prepare to keep my days busy, you know, when I am retired that you know I'm not going to be one of these people that's kind of bored or you know sorry I retired or whatever. So, it's a really huge difference in that I've started to focus me on making changes. (A&O)*

3. Full details of the outcomes and measures used can be found in Appendix C

**FIGURE 2. Proportion of respondents (%) who experienced an improvement, decline or no change in key outcomes between baseline (T1) and each subsequent follow-up (T2, T3 and T4)**



The courses encouraged participants to think about the implications of retirement, some of which had not been considered previously:

*I think it will erm help me to start understanding more what I want to do in retirement and when I want to retire, yeah. And then it won't be such a big step change come the day when I do hand in me notice and retire fully. (CWP)*

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*Erm, it's probably more of the holistic thing, you know, to consider your health and how much you're actually getting from your job [...] but to look at the bigger picture and how much really, speaking entirely personally, I would miss the social side, you know, that structure to the week. I think that would be one of the difficult things to cope with if you retired, if you went straight from work to full retirement, losing that structure in your week. It was encouraging to sort of look at the options to build up a new structure in your life post-retirement. (CWP)*

Significant proportions of the sample recorded a decline in the quality of their social relationships shortly after taking the course (51% at T2) although this proportion had declined by T4 (43%). However, at no point did more than 37% of the sample reported improvements relative to baseline in the quality of their social relationships. This could be because that this is the first time that people have really evaluated the quality of their social networks. Hence, it is not that participants' networks deteriorate following the course. Rather, it is that as a consequence of taking the course, participants are better equipped to identify negative social relationships within their social network. Thus, there were some amongst the interviewees who subsequently made changes to their social networks:

*[I've been] just really gently reflecting on relationships in my life and why I have certain relationships and who I have the relationships for. Erm I'm just making gentle changes in that to maybe support me, nurture me and help me be resilient now [...] I'll be making more friends through [a new course] erm but other people that would be in my life er that seem to be in my life for them rather than for me is just putting boundaries around those type of relationships... [I've] maybe prioritised my needs, so they're on an equal footing really. (A&O)*

It should also be noted that 20% of respondents reported that there was no change in the quality of their social relationships relative to their baseline levels. It seems likely that these people already had good quality social relationships when they started the course. As another interviewee told us, the course was an opportunity to reflect upon their lives and evaluate their social networks which proved to be reassuring:

*I think for me what that reinforced is that I have a good work/life balance [...] I have some great friends and a very good family support, very good relationships so I think it probably just helped to reinforce some of that for me. (CWP)*

For acceptance of change, self-judgement and attitudes to ageing, there appears to be a "honeymoon effect", with an initial improvement that subsequently weakens. Thus, 55% of participants were improved in their acceptance of change at T2; this increased to 64% of participants at T3, before declining again to 47% at T4. Similarly, 49% of participants showed an initial improvement in self-judgement; this had increased to 55% at T3, before falling back down to 46% at T4. Around 18% recorded no change from their baseline measure six months after the course had finished. In addition, there was a slight increase in the proportion of people who showed a decline in self-judgement from T2 (30%) to T4 (36%). Similarly, 52% of people demonstrated an improvement in attitudes to ageing at T2 but this proportion dropped off, so that by T4, a higher proportion of people reported a decline in attitudes to ageing (44%) than reported an improvement (39%).

Finally, compared to how they felt before taking the course, the majority of respondents reported a decrease in job involvement at each of the time points after the course. Two weeks following the course, 63% of participants reported that they felt less involved in their job. Although this figure dropped by the 6-month mark, almost half of all respondents still reported lower levels of job involvement than before the course. Some of this decreased job involvement may be the product of a winding down of contact time rather than a decrease in intensity or commitment at work when working. The interview data suggest that these observed changes in job involvement scores may be attributed to a re-evaluation of their job and of their hopes for the future:

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*I'm in my current employment for maybe 25 years in the same job and to a certain degree you become defined by that and those, only three days, that's all it took, was enough time for me to stand back and say I do not have to be defined by this anymore. I'm a person in my own right er in terms of say the transferable skills, what I want, what I want at the core of my being, what I want to let go. Erm yeah, I'm, I'm, I feel much more powerful, powerful can be such a negative word but powerful in a positive way erm to decide who I am and what I want. And ultimately that will make me a better worker in my current employment but also help me move towards other options that are maybe more nourishing to me. (A&O)*

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*It put a very positive focus on working longer and you can do the two, you know, you can still work but also have some down time. But not to be scared of when you do make the decision to retire. It can be a new beginning rather than an end, you know, an end to your working life. (CWP)*

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*I think before I went [on the course]...I thought, you know, is it time for me to step down as well because I've been in post 11 years. Yeah, you know, that sort of thing, just weighing things up really, but I think probably, health permitting obviously, another couple of years and I'll consider it again (CWP)*

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It was also the case that there were also a number of participants who had already developed ideas about what they want to do and were already thinking about the transitions they would encounter and how they might manage them. Some were either very familiar with the course topics, and/or had plans in place and were already positive before the course started:

*I've got exciting plans of what I'm going to do and, yeah, it was more, for me it was a really enjoyable day because none of it was a threatening subject at all really, even before I started, and so when we were talking about, you know, maybe people losing identities, all that sort of stuff, those bits aren't an issue for me, although it did make me think a little bit about that, I guess. (CWP)*

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For these participants there is probably relatively little impact that this course, or any course, could have as they are already doing well. Nonetheless, it is clear from the qualitative data that, even for these participants, the opportunity to reflect within the framework of activities provided by the course was considered valuable.

## DO PSYCHOSOCIAL OUTCOMES VARY FOR DIFFERENT GROUPS OF PEOPLE, AND IF SO, HOW?

A key question for this evaluation was whether the courses had a similar impact on all respondents or whether certain groups benefitted more or less from participation. Of course, as already noted, this was a very homogenous sample and consequently it was not possible to compare outcomes by gender, ethnicity or health. In light of this we elected to compare groups based on the following characteristics: age, level of educational qualification and baseline values for of each outcome measure.

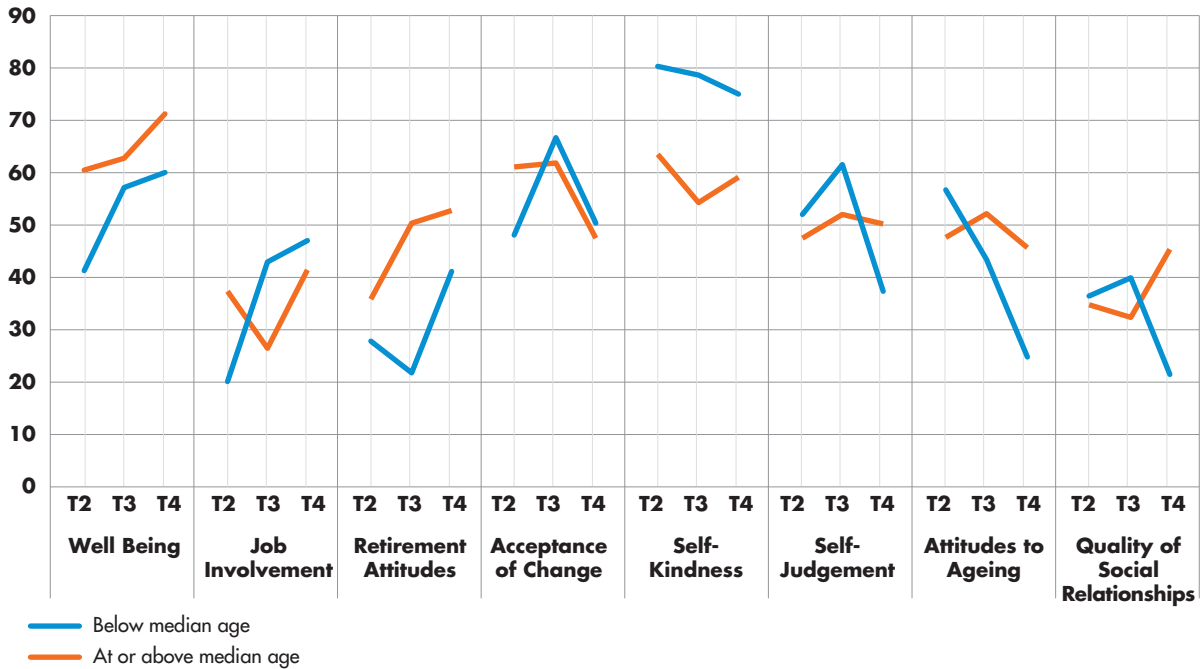
Rather than being interested in chronological age per se, we used age as a rough proxy for time until pension age. On the one hand, one might expect that those closest to pension age would benefit most from these courses as they are more likely to be anticipating age-related transitions. On the other hand, it could be that older participants have already made plans and provisions for these transitions and that therefore, the course would have limited impact. To explore this, we calculated the median age of the participants (56 years) and then divided the sample into those who were 55 years or younger and those who were 56 years or older. The analysis looks at the proportions of both groups who report an improvement in outcome measures at each timepoint relative to their baseline scores. While we see that a greater proportion of the older group than the younger group showed improvements in wellbeing and attitudes to retirement—with the converse true for self-kindness—overall, there is no consistent age-related pattern in improvements in outcomes (**Figure 3**). We would conclude that the courses impact equally on workers aged 50 and over.

To explore the impact of education on outcomes, we divided the sample into those who were educated to degree level or above and those who were educated to less than degree level and/or had a professional qualification (**Figure 4**). For wellbeing and self-judgement, a greater proportion of those educated to degree level or above compared with those without a degree showed improvement, especially in the short- and medium-term. For attitudes to retirement, acceptance of change and self-kindness, a greater proportion of those educated to degree level or above showed improvement at T<sub>2</sub> and T<sub>3</sub> compared to those without a degree. But by T<sub>4</sub>, these differences were no longer evident. Only for attitudes to ageing do we see an improvement among a greater proportion of those without a degree compared to those with a degree, but the difference is quite low.

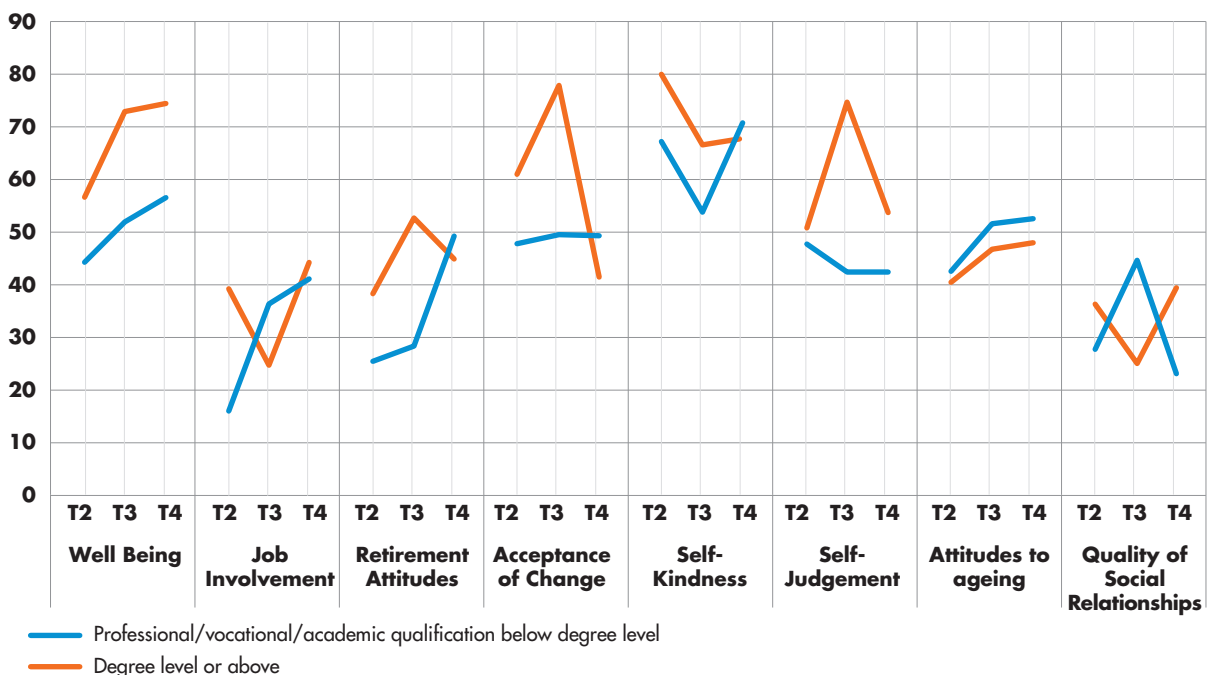
Lastly, we wanted to see if there were differences in outcomes based on whether the participants were doing better or worse in these outcomes before they started the course. To do this we separated respondents into two groups, based on whether they were above or below the median value for each of the specific outcomes prior to the start of the course. Then we looked at the proportions who reported an increase on each of the outcome measures at each of the successive time points. **Figure 5** shows that, with the exception of attitudes to ageing, a much higher proportion of those who started with below median levels reported improvements for all outcomes at all follow-ups compared to those who started with above median levels. For example, at the two-week follow-up, 70% of those who began the course with below median levels of wellbeing had increased wellbeing, compared to just 37% of those who started the course with above median levels of wellbeing. This is also the case at each subsequent follow-up. Similarly, of those with below median (signifying more negative) attitudes to retirement before the course, a higher proportion reported improved attitudes towards retirement than the above median group, and this proportion was still higher at the end of the study period. These results suggest that these courses have had the biggest positive impact on those who needed them most.

As noted, the only anomalous pattern is for attitudes to ageing. Whilst a greater proportion of those with below median (less positive) attitudes to ageing before the course experienced improvement than those who had above median attitudes to ageing, the difference between the groups was gone by the 3-month timepoint and there was still no difference at the 6-month follow-up.

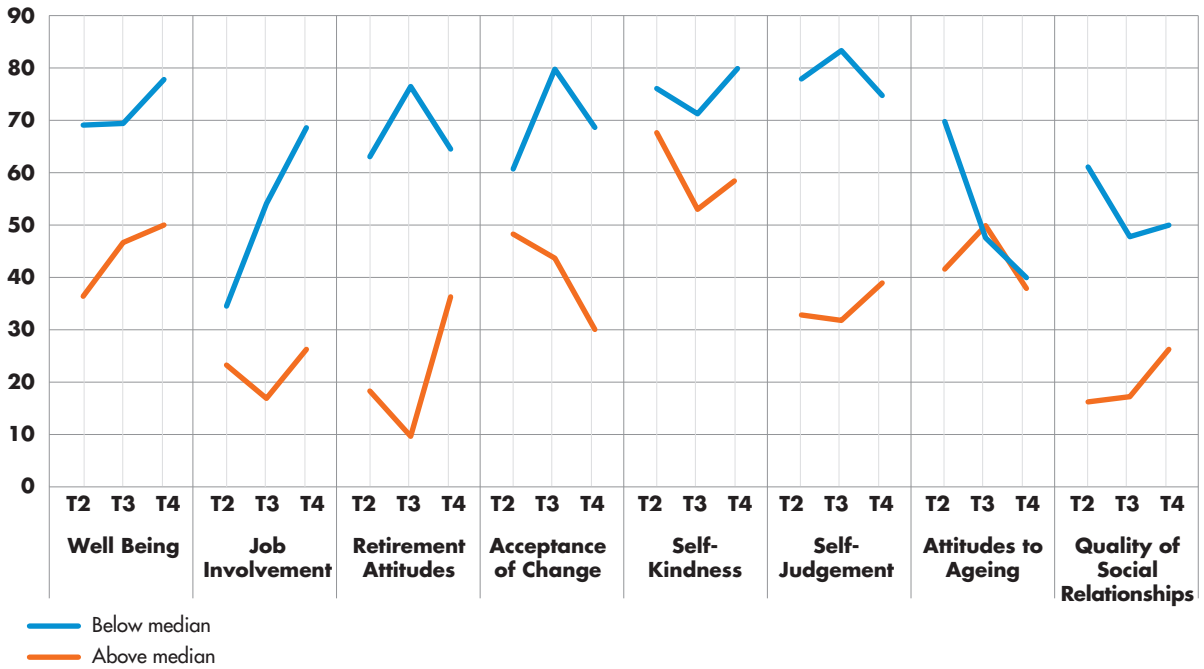
**FIGURE 3. The proportion which shows improvement at T2, T3 and T4 relative to baseline in the main outcome measures, depending on whether they were above or below the median age (56 years) before the course began**



**FIGURE 4. The proportion which shows improvement at T2, T3 and T4 relative to baseline in the main outcome measures, depending on whether they were educated to degree level or not**

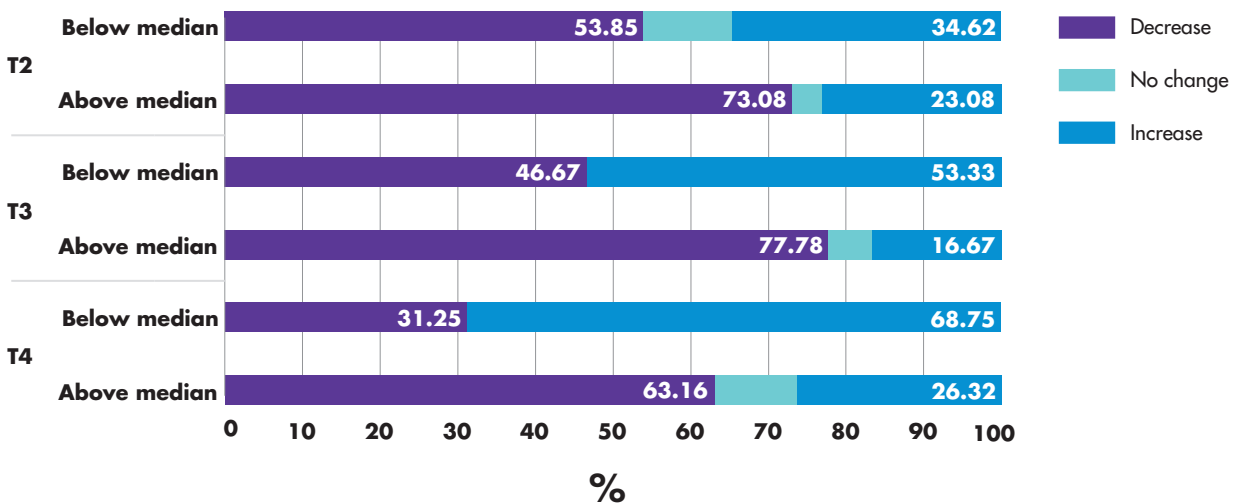


**FIGURE 5. The proportion which shows improvement at T2, T3 and T4 relative to baselines in the main outcome measures, depending on whether they were above or below the median value before the course began**



The results for job involvement are particularly interesting. These show (Figure 6) that a majority of those with below median levels of job involvement at T1 had improved levels of job involvement at T3 (53%) and T4 (69%) while a majority of those with above median levels of job involvement at T1 had reduced levels of job involvement at T3 (78%) and T4 (63%).

**FIGURE 6. Change in levels of job involvement for those who began the course with above or below median levels of job involvement (%).**





As noted above, these changes in job involvement scores may be the result of re-evaluating one's job, one's place in the organisation and hopes for the future following the course. Certainly, many participants reported that the courses had the effect of making them feeling valued as (older) workers and that the organisation was investing in them and their futures:

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*It was a very progressive – to run such a course was a very progressive move on behalf of the HSE and it showed that they really, truly valued their staff. So to actually have something like this was like, really? Three whole days? For me to look at me and to see, you know, where I'm at, where I'm going, what I want? Was like, wow, what a gift, it really was a gift, you know. (A&O)*

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Being valued by the organisation is mentioned by other participants: 'the message we got was that, you know, albeit we're the older end of the staff range now, it - we were still valued and [CWP] is prepared to sort of be flexible'. This was echoed by another CWP employee who said that the course gave her the 'sense that I was being valued as a worker'. This sense of support had a positive effect on the participants who were re-energised to give back to their organisation:

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*Do you know what, I do think this is really key because I did feel lucky to be there. So yes, definitely. And I am determined as well that over the next six months I am gonna work my socks off so that this job is in the best place it can be when I finally go. So, they will continue to get 110 percent out of me right up until that last day. And that's because I love the trust so much. (CWP)*

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These findings fit with previous research which shows that 'affective organisational commitment' among employees is particularly desirable from an employer's perspective. This is because employees who express this type of commitment identify with what the organisation stands for and freely choose to associate themselves with that organisation (Meyer & Allen, 1997). As such, this type of organisational commitment is most closely associated with the intention to remain in work until later in life (Winkelmann-Gleed, 2011). It may be this that drives increases in job involvement.

Meanwhile, decline in job involvement appears to be linked to an increased sense of agency in some participants. There is some evidence that very high levels of job involvement can lead to burnout (Azeem, 2010; Griffin, Hogan, Lambert, Tucker-Gail, & Baker, 2010) and have a negative impact on employee health (Frone, Russell, & Cooper, 1995). Hence, rather than being a negative, a decrease in job involvement could enable people to make better choices about how they manage their work-life balance and to continue to be a productive member of their organisations.

## CHANGES IN GOAL CLARITY

In addition to finding out about changes in these key psychosocial outcomes, course providers were also interested to learn whether attending the course helped participants to decide what future actions they wanted to take across a number of domains. To capture this, respondents were asked, at both baseline (T1) and follow-up (T2, T3 and T4), how clear their goals were across a number of dimensions: career/job, health, learning or study, finances, relationships, volunteering,

and hobbies or pastimes. This was measured on a scale of 0-10, with 0 representing no clear goals and 10 representing very clear goals. From the scores that respondents gave we were able to calculate change in goal clarity at each timepoint relative to baseline. From this we grouped respondents into one of three groups at each follow-up: i) those whose goals became less clear; ii) those whose goal clarity did not change; and iii) those whose goals became clearer between baseline (T1) and subsequent follow-ups (T2, T3 and T4; [Table 7](#)).

**TABLE 7. Proportion of respondents (%) whose goal clarity became less clear, more clear or was unchanged between T1 and each of T2, T3 and T4**

|                            |            | <b>T1-T2</b> | <b>T1-T3</b> | <b>T1-T4</b> |
|----------------------------|------------|--------------|--------------|--------------|
| <b>Career/job</b>          | Less clear | 32.81        | 26.83        | 33.33        |
|                            | No change  | 20.31        | 34.15        | 33.33        |
|                            | More clear | 46.88        | 39.02        | 33.33        |
|                            | N          | 64           | 41           | 36           |
| <b>Health</b>              | Less clear | 22.73        | 30.23        | 20.51        |
|                            | No change  | 30.30        | 27.91        | 46.15        |
|                            | More clear | 46.97        | 41.86        | 33.33        |
|                            | N          | 66           | 43           | 39           |
| <b>Learning or study</b>   | Less clear | 47.62        | 40.48        | 42.42        |
|                            | No change  | 12.70        | 26.19        | 21.21        |
|                            | More clear | 39.68        | 33.33        | 36.36        |
|                            | N          | 63           | 42           | 33           |
| <b>Finances</b>            | Less clear | 18.46        | 20.93        | 29.73        |
|                            | No change  | 23.08        | 32.56        | 24.32        |
|                            | More clear | 58.46        | 46.51        | 45.95        |
|                            | N          | 65           | 43           | 37           |
| <b>Relationships</b>       | Less clear | 21.88        | 28.57        | 31.43        |
|                            | No change  | 28.13        | 35.71        | 37.14        |
|                            | More clear | 50.00        | 35.71        | 31.43        |
|                            | N          | 64           | 42           | 35           |
| <b>Volunteering</b>        | Less clear | 41.86        | 32.43        | 35.59        |
|                            | No change  | 25.58        | 29.73        | 25.42        |
|                            | More clear | 32.56        | 37.84        | 38.98        |
|                            | N          | 43           | 37           | 59           |
| <b>Hobbies or pastimes</b> | Less clear | 35.59        | 48.72        | 41.18        |
|                            | No change  | 25.42        | 20.51        | 32.35        |
|                            | More clear | 38.98        | 30.77        | 26.47        |
|                            | N          | 59           | 39           | 34           |

As can be seen from Table 7, the results for the change in goal clarity were rather mixed: immediately following the course 47% of respondents reported having a clearer idea about their career/job goals; 58% about their finances and 50% about their relationships. However, 48% reported having less clear goals with regards to learning and study and 42% were less clear about their volunteering goals. Even in those areas where a significant proportion of respondents reported greater clarity, there was still a sizable proportion who reported being less clear about what they wanted to do. For example, a third of people reported lower levels of career/job goal clarity following the course and almost a quarter reported being less clear about their health goals. For hobbies and pastimes, approximately one-third of respondents were clearer about their goals and approximately one-third were less clear.

By the final follow up at T<sub>4</sub>, the proportion of people who had had increased clarity with regards to career/job, health and relationships at T<sub>2</sub> had dropped to about a third. This suggests that much of the change in goal clarity for these domains happens soon after taking the course.

Clarity as regards ones' finances shows less of a decline over time, with 46% of participants still clearer at T<sub>4</sub> than at T<sub>1</sub>, suggesting that financial planning has a persistent impact on participants. So whilst there are some positive outcomes from the course in terms of improving people's ideas about what they want to achieve in various areas of their lives, the course as a whole seems to have the greatest impact on the more 'traditional' issues associated with ageing and retirement, i.e. work, health and finances, and a more ambiguous impact on helping people to identify what actions they might want to undertake in other areas, such as learning and volunteering.

It should be noted that, as for the changes observed in job involvement and quality of social relationships, we consider that a decrease in goal clarity is not necessarily a bad thing. It is possible that people entered the course with what they felt were good, achievable goals, but that, as a consequence of taking the course, they felt that they needed to re-evaluate these goals and come up with better goals for themselves. However, reformulating goals can be a lengthy process, in which one has to reflect, gather new information and then evaluate this information. Hence, over the relatively short time period of the evaluation it is possible that we were unable to detect these longer-term changes. Future evaluations should look to extend the follow-up period to at least 12 months.

## DO CHANGES IN GOAL CLARITY VARY FOR DIFFERENT GROUPS OF PEOPLE, AND IF SO, HOW?

As with the analyses for psychosocial outcomes we were interested to know whether the course impacted similarly on changes in goal clarity for all participants or whether certain groups became more or less clear in their goals as a result of having participated in the courses. As already mentioned, the homogeneity of the sample meant that we were restricted in which groups we could look at. Hence, as for the analyses of the psychosocial outcomes we compared groups based on the characteristics of age, level of educational qualification and baseline values for the respective outcomes.

**Figure 7** shows no consistent trends in the proportion of respondents who reported greater goal clarity at follow-up for those above and below the median age (56 years) at baseline. For most of the goals, the lines plotting the proportion of participants above and below the median age who report improved goal clarity cross. The exceptions are for health goals and relationship goals for which a greater proportion of those below the median age showed improvement at all time points compared with those above the median age. However, it should be noted that the proportion of participants in the below median age group showing improvements in these goals dropped quickly over the 6-month follow-up period.

Overall, the results of goal clarity by educational level did not show any consistent pattern (**Figure 8**). Except for ones' goals as regards health and learning, there was no clear difference between those with or without a degree in the proportions reporting greater goal clarity. In contrast, a greater proportion of those educated to degree level have greater clarity around health and learning at all three follow-up timepoints than do those without a degree. However, where health is concerned, the proportion of people in both educational groups who are clearer about their health goals than at baseline, falls rapidly over the follow-up period. Among respondents educated to degree level, we see an up-tick in the proportion of people who have increased clarity as regards their goals for career, learning, relationships and hobbies at the 6-month follow-up. But, as noted previously, we need to be cautious about giving too much weight to these results given the relatively low numbers still involved in the study by T4 (see Appendix E).

Analysis of change in goal clarity according to whether respondents were above or below the median value for goal clarity in each of the domains prior to the start of the course shows that, as for the psychosocial outcomes, those who started with below median levels for any of the domains experienced much higher increases in goal clarity than those who started with above median levels (**Figure 9**). However, the evidence from the interviews suggests that even for those who started with clear goals the courses still had an important, reinforcing effect.

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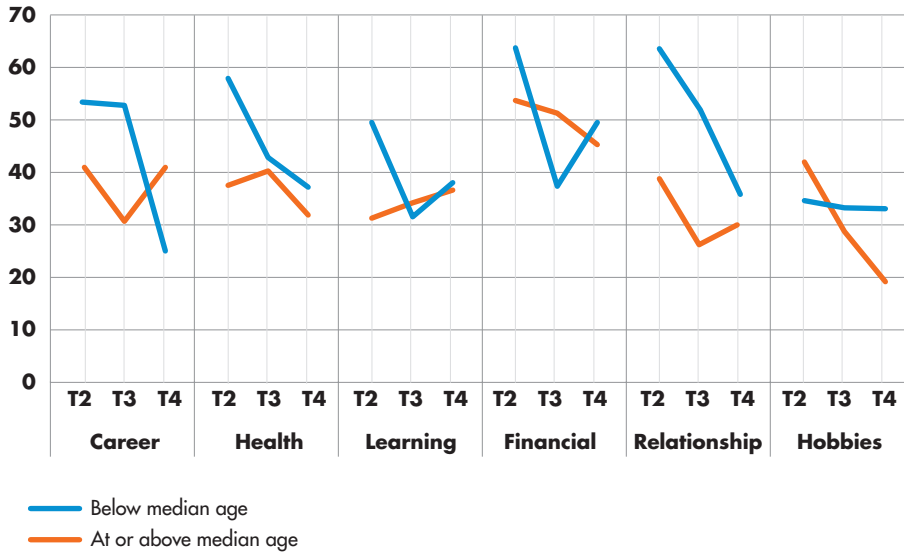
*Well I think that it, it just might move things a step forward really. It confirmed to me that [retire] was what I wanted to do. It's made me realise how lucky I am to be in a position to be able to do all this. (CWP)*

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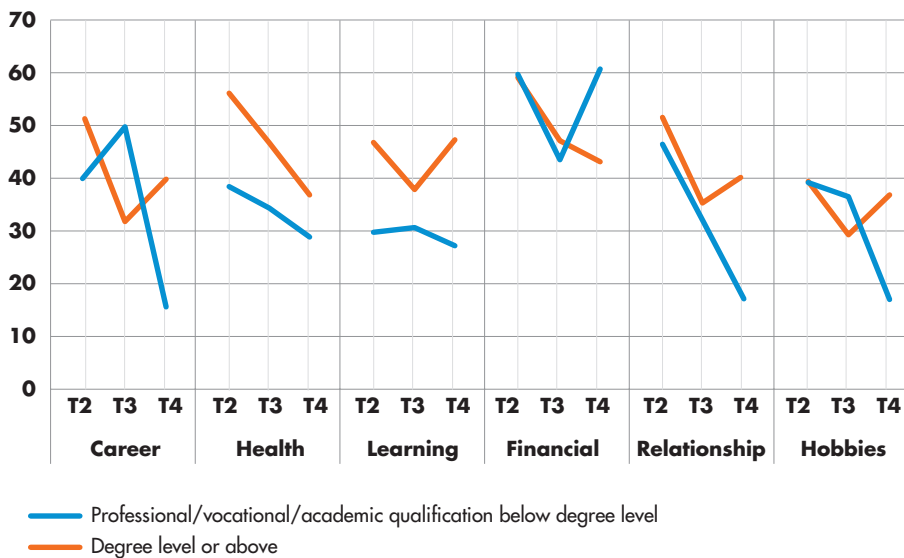
*Again, I'd say reinforced rather than influenced. It's just confirmed my erm what I was thinking of doing, it's confirmed that yeah, you are doing, making the right decision, yeah. (CWP)*

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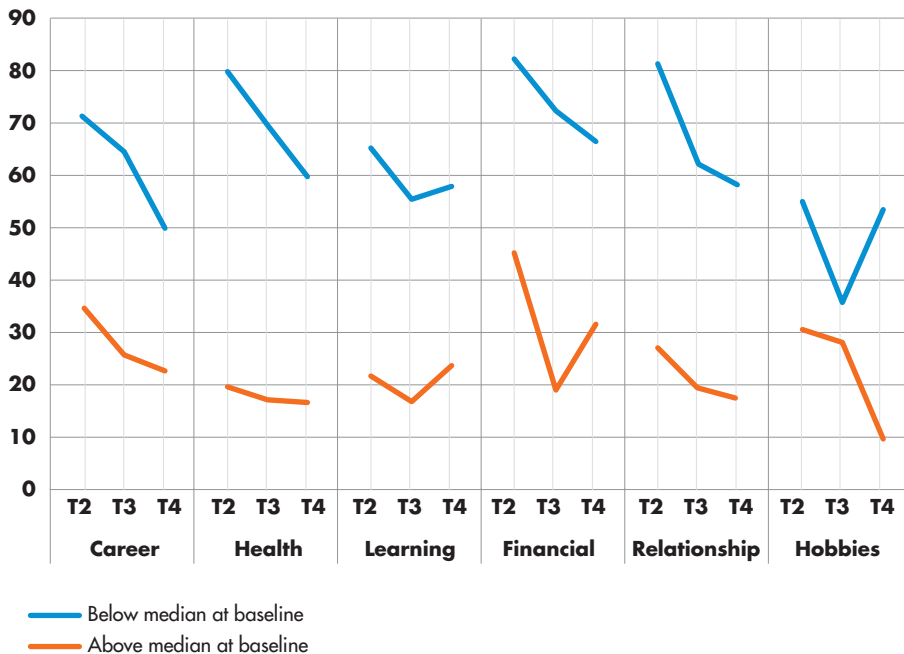
**FIGURE 7. The proportion which shows improvement at T2, T3 and T4 relative to baseline in goal clarity, depending on whether they were above or below the median age at baseline**



**FIGURE 8. The proportion which shows improvement at T2, T3 and T4 relative to baseline in goal clarity, depending on whether they had a degree or not**



**FIGURE 9. The proportion which shows improvement at T2, T3 and T4 relative to baseline in goal clarity, depending on whether they were above or below the median value at baseline**



## OUTCOMES FOR THE EMPLOYING ORGANISATION

The course providers and funders were also interested to learn whether the courses led to any benefits for the employing organisation. Such an approach is relatively rare within the existing research on older workers which tends to look at the impact of organisational factors on individual outcomes, rather than vice versa. However, there is some evidence that age-positive management practices can lead to improved organisational commitment for some older workers, through enabling their individual agency (Winkelmann-Gleed, 2011). Nevertheless, before we proceed, it is important to note that identifying the impact of management practices on organisational outcomes is not straightforward. As Truss (2001:1121) observes, 'outcomes at the individual and organisational levels are complex and often contradictory'.

Nonetheless, the qualitative data revealed that respondents thought that the courses had a much wider, positive impact for their organisations. For example:

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*We have an ageing workforce and therefore it's something that Trusts, I believe, should be delivering... if you want people to be able to stay in work and function and continue to deliver a good quality service (CWP).*

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*And I guess the course, you know because I was aware that the course was about, in part, trying to stop the brain drain it made me think a little bit 'Actually I am a very valuable person to CWP and you know, maybe that gives me some bargaining chips for next year in getting things how I want them to be'. (CWP)*

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This was echoed by another interviewee who saw the course as part of the general workforce management policies.

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*This course shows that on a strategic, you know on a strategic level this is something they're seeking to do so it's not like you're asking them a favour, it's something that suits their strategic objectives, isn't it, to maintain you in the workforce. (CWP)*

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As noted previously, participants were very positive about what they saw as the support provided by their organisation for them to attend the courses and as evidence that they were valued. These insights indicate that, through participation in the courses, employees can gain a new appreciation of their employers, which may lead to a decision to stay longer in work. In this way, employers can become employers of choice and improve their retention of their skilled older workers.

## HOW HAS THE PROJECT CONTRIBUTED TO OUTCOMES FOR INDIVIDUALS AND EMPLOYERS?

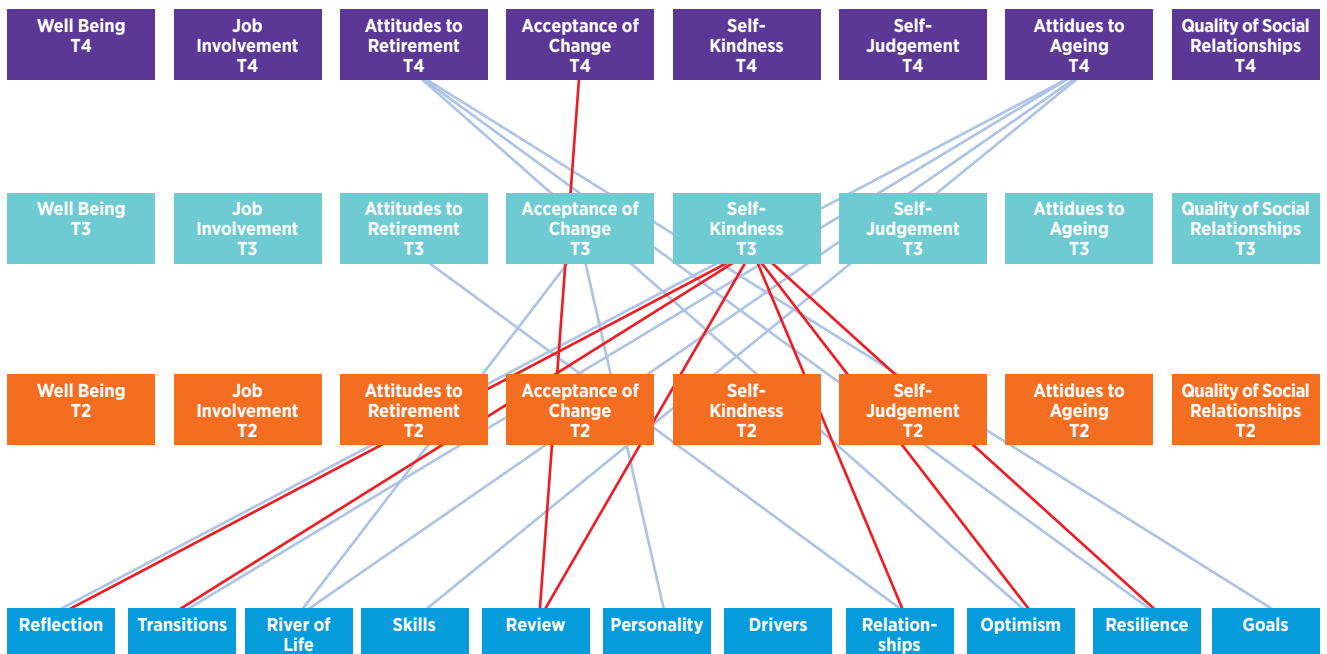
We also sought to explore the extent to which the perceived utility of each course component contributed to the observed changes in psychosocial outcomes and job involvement measures. As we have already seen, although respondents were generally positive about the course components overall, there were some components that were seen as somewhat less useful than others. Identifying which components lead to which outcomes would help us understand the pathways through which the course exerts its impact.

To do this we have used a correlation analysis to look at the extent to which respondents' ratings of the usefulness of an activity was associated with changes in each of the outcome measures at each of the follow-ups. Correlations can range from -1 (a perfect negative correlation) to +1 (a perfect positive correlation).<sup>4</sup>

However, such large values are very rare. As a rule of thumb, values between 0.00 and 0.29 are considered weak, values between 0.30 and 0.59 are considered moderate and values between 0.60 and 1.00 are considered to be strong. Where values are positive, an activity was associated with an improvement in the outcome. Where values are negative, an activity was associated with a decline in the outcome.

Figure 10 shows that very few of the individual activities appear to have had a direct impact on any of the outcome measures.<sup>5</sup> Given that this is not a representative sample we are not concerned with issues of statistical significance. Instead we have focused on the size of the effect and identified any moderately strong relationships (i.e. 0.30 and greater). These are indicated by the lines in the figure linking the activities to the outcomes. Lines in red indicate a negative correlation and lines in blue indicate a positive correlation. We did not find any strong relationships (i.e. 0.60 and greater) in the analyses.

**FIGURE 10. Correlations between how useful the participants found the course activities and change in outcomes at each follow-up (T2, T3 and T4). Only notable correlations are shown. Lines in red indicate negative correlations. Lines in blue indicate positive correlations**



4. We have used Spearman's Rho as these are non-parametric data  
 5. The correlation coefficients can be found in Appendix F.



Because there were only weak correlations between activities and outcomes at T<sub>2</sub> there are no lines linking activities to outcomes at this level. However, by the 3-month follow-up we can see some evidence that course activities have had an impact on some outcomes. But this is something of a mixed picture. It appears that the River of Life and the Personality exercises were both associated with a positive change on acceptance of change. Likewise, the Relationships exercise was associated with a positive change in attitudes to retirement. However, the Reflection, Transitions, Review, Relationships, Optimism and Resilience exercises were all associated with a negative change in self-kindness.

At the final 6-month follow-up (T<sub>4</sub>), we see a different pattern again. Now, the Reflection, Transitions, River of Life and Skills exercises were all associated with a positive change in attitudes to ageing. The Optimism exercises and the Goals exercises were associated with positive changes in both wellbeing and attitudes to retirement. The Resilience exercises were also associated with a positive change in attitudes to retirement. However, the Review exercises had a negative association with acceptance of change.

Overall, it is very difficult to draw any substantive conclusions from this analysis. It is very possible that we simply do not have a sufficiently large sample to pick up on these effects. Moreover, as seen in Figure 1, most respondents rate the course activities very highly. Thus, although we used the full 5-point response options this means that there is relatively little variation in the reported usefulness of the individual activities which further limits the explanatory power of these variables: this is because if everyone is clustered at the 'useful' and 'very useful' end of the distribution then there are few people at the other end to compare to.

Aside from these possible methodological issues, it is important to note that many respondents did not focus on the value of specific activities but tended to see the course in holistic terms. That is, it may be that it is the combination or totality of activities that drives changes in the outcomes rather than individual activities. Related to this is the value ascribed to the courses as a space for reflection and, perhaps, confirmation of existing plans or ideas. This was a theme that came through quite strongly in a number of interviews:

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*Oh would I say I haven't made specific plans as a result of [the course], no, I would describe the strength of the course for me is the fact that it gave me time to reflect, it gave me material to return to and erm but they were the two strengths really for me erm in the course. Erm you know, time out as well, that was actually, not talking, that was really important cos I was so busy. (A&O)*

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*Well for me as I say to see what the difference was and then on a personal level... because you just don't get that space, you know, and I thought the space was the big thing for me. I had the space really to think if somebody was trying... to guide your thoughts and really focus your thinking... I found it just to be very insightful that way for me, because I really hadn't taken the time to really have time to think about it so it was the space, to have that space, and to be guided in my thoughts I suppose and what I needed to consider. (A&O)*

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## WHAT PRACTICE, RESOURCES OR PROCESSES IN THE ORGANISATION ARE IMPORTANT IN ENSURING SUCCESSFUL IMPLEMENTATION AND EFFICACY OF THIS PROJECT?

Drawing on our discussions with course providers before the courses began, we were able to identify a number of factors that they felt were important for the course to run successfully. These were:

- That organisations fully support their employees to attend and that line managers are enabled to release employees to do so.
- Courses must be advertised in an appropriate way in order to appeal to the right audience. Course providers recounted an example of an organisation that targeted its advertising for employees aged 50 and over. However, this resulted in offending staff members who did not want to be singled out as older workers. Another organisation first targeted only those who were within a year of retirement, which proved to exclude potential participants who were further from retirement but also would benefit from the course.
- Advertising materials should give a clear indication of what type of course it is in order to meet the expectations of attendees. According to one course providers, some participants 'said that the course didn't meet their expectations or that it only partly met their expectations and in each case it was because they were looking for more financial planning'.
- Facilities must be accessible and comfortable. We have already seen from some of the interviewee data and responses to the open-ended questions in the survey that some participants felt that the rooms were too small or uncomfortable which impacted on their experience of the course.
- Materials that are required should be prepared in advance and made readily available on the day.
- Any IT or AV equipment should be functioning and checked.

One issue that came through in the interviews with the participants was impact that the length of course had on their experience. However, there was not a consistent pattern. For some the course was the right length:

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*I liked the intervals and I think being honest it does kind of get you, you know, give you time to process and think what you've gone through. I think if you had two consecutive days it could be confusing, you know, it just could be too much, you know, too quickly. So I did like the space in the days. And I think we did, probably it was one day a week, something like that anyway, it was fairly consistent anyway, so I did think that was good (A&O)*

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*I think it's probably good that it's not just one on top of the other, you just go and do it, you know, because after the first one you think, you know, and you're better going back the second one going oh yeah, this is what that's about, yeah. (A&O)*

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However, there were other respondents felt that the course could be delivered over a shorter time period:

*The only one thing I would have said is that I know it was a three-day programme, personally I felt it probably could have been delivered over two, if the days had started earlier and ended a little bit later. Now I know he was travelling to Dublin, you know Kilkenny to Dublin, and obviously he has train times and that to catch, but I just felt, I suppose, that it probably could have been done over two days with a longer schedule. (A&O)*

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*I suppose it depends on your needs. It probably could have been a bit shorter for myself because I already do quite a bit. I suppose it depends who's there. (CWP)*

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In our discussions with the course providers they did not express a very strong opinion that the specific format of the delivery was important per se, but that it could be adapted for different delivery schedules depending on the needs of the participants.

## 6

## SUMMARY

Overall the courses appear to have had a positive impact. The participants rated the courses very highly and it is clear that the vast majority felt that the courses were worthwhile. Clearly there is a need for courses such as these, in conjunction with more practically focused courses on retirement planning, for those workers who are approaching later life. As the figures show, the vast majority of participants enrolled on the courses to learn about how to manage the sorts of transitions that they may face in later life, such as retirement, as well as for personal development. This goes to show that transitions, such as retirement, are complex, multifaceted processes that require more support than just pension planning. In this respect, both the figures from the survey and what people told us in the interviews show that these courses are meeting this need for these participants.

A strongly recurring theme is that participants really valued the opportunity and support, from both the facilitator and their peers, to reflect on where they were in their lives and what they might want from the next phase. It is worth reiterating that all the participants were working in the healthcare sector. This is a very demanding sector, at all levels, and therefore it is likely that participants rarely get the opportunity to take the required time to properly assess their situation. Moreover, it is typical of those who work in healthcare to put the needs of others before their own. This is borne out in some of what the interviewees told us. Hence, for many this may be the first time that they have focused on themselves and their needs. Overall, the participants found the course exercises to be very useful. In particular, they rated the exercises on Optimism (*Identifying areas for improvement in wellbeing* [CWP] and *Cultivating Optimism* [A&O]), Resilience (*Resilience exercise* [CWP] and *Resilience Sheets* [A&O]) and Transitions (*Identifying life transitions* [CWP] and *Transitions Event Questionnaire* [A&O]) very highly.

The course had a positive impact on whether participants engaged in a number of activities. Following the end of the course, almost 90% of participants said that they had had a conversation with a partner or spouse and around three-quarters with friends or family about their plans for the future. Outside of these planning activities, over two-thirds of respondents said they had started to do more exercise and 40% had started a new hobby or leisure pursuit. These types of activities are important for ensuring health and wellbeing as people age, especially if they plan to reduce the number of hours that they work or cease working altogether.

In addition, after six months almost 50% of respondents were clearer about their financial goals than they had been at baseline; 40% had sought professional advice about their finances and 32% had talked to their line manager about undertaking part-time or flexi work. Of note, both these types of activity are potentially complex to execute, involving, for example, a financial advisor. Hence, it is possible that over a longer period of time, the proportion of people who engage in these activities as a consequence of having participated in the courses would increase.

In general, participation on the course was associated with improvements on a number of key outcome measures. The data showed significant improvements in self-kindness, wellbeing, acceptance of change and self-judgement that were, by and large, sustained over the entire 6-month study period. We also saw improvements in people's attitudes to retirement, with almost half of participants reporting more positive attitudes to retirement at the end of the 6-month period than before they started the course. Interestingly we recorded an initial decrease in people's sense of job involvement, with 64% of participants recording reduced levels of job involvement two weeks after the course finished. This is unsurprising. As noted above working in healthcare is a very demanding occupation with people often working long hours and/or on shift work (Jennings, 2008). Therefore, for many participants this could well have been the first time in a while that they had had the opportunity to think about the role of work in their lives and whether they were happy working as much as they did. It could therefore be that participants took this

opportunity to make changes to their working patterns, e.g. flexi-work or reduced hours, in order to ensure that they could still continue working in a way that met their needs.

Participants also demonstrated improvements in goal clarity over the study period, with the largest effect observed in the short term, i.e. within two weeks of the end of the course. By the 3-month and 6-month follow-up, the proportion of participants who reported having clearer goals across most domains had declined from that seen at T2. Still around one third of respondents reported clearer goals in all of the domains at the 6-month follow-up. The notable exception was for financial goals for which 46% of respondents still had clearer goals at the 6-month follow-up than at baseline. In the interviews, respondents did note that they felt that they would have benefitted from some sort of catch-up or refresher session after the course to help keep them on track. This suggests that running such a session sometime between 2-weeks and 3-months following the end of the course could help to preserve that initially higher level of goal clarity for participants.

One of the strongest findings from our evaluation is that the courses seem to provide the greatest benefits for those who need it most. Compared to those who started the course with already relatively high levels in each of the key outcome measures, we saw that those who started the course with lower levels experienced the greatest improvements. For example, 70% of those who started the course with below median levels of wellbeing experienced improvements in wellbeing after the course compared to just 38% of those who started with above median levels of wellbeing. The same was true for levels of goal clarity. A greater proportion of those with below, compared with above, median levels of goal clarity when they started the course experienced improvements in goal clarity following the course. There was also some (though less strong) evidence that those with higher levels of education were more likely to benefit from the course compared to those with lower levels of education. For example, those who had been educated to degree level or above were more likely to report improvements in wellbeing compared to those who did not have a degree level education.

Whilst identifying the impact of these courses on organisational outcomes is not straightforward due to the complex set of factors that might mitigate or moderate any relationship as well as the relatively short follow-up time for the study, the qualitative data suggest that some participants felt more positively about the organisation following the course. They reported feeling more valued by their organisation and that they felt that the organisation was investing in them and their future by allowing them to attend the course. For some, this led to a renewed sense of commitment to the organisation, which supports the findings for the increase in job involvement over the mid to long term for those with low levels to start with. Ideally, it would have been better to be able to follow respondents over a longer period to see if they stayed with the same organisation and/or whether they changed roles or took on additional responsibility within the organisation. Hopefully future studies will be able to explore these issues.

Overall, the evidence is that the individual components of the course do not have a very strong impact on the key outcome measures. Rather, it is the combination or totality of activities that drives changes in the outcomes rather than individual activities. This is somewhat confusing as some of the course activities would appear to be directly related to key outcomes, e.g. one would expect the relationships exercises to have an impact on the participants' quality of social relationships. It is possible that the lack of any clear impact of the course exercises is a methodological artefact of the relatively low numbers in the sample. However, if this were the case, we would expect to see effects at T2, where the sample is largest, and not at subsequent timepoints. In fact, we see the opposite. Also, without a proper control group, we cannot rule out the possibility that improvements in outcomes are the product of having a few days away from work. But the very low proportion of participants (14%) who said that getting time away from the office was a reason for them to take the course suggests that this is not the case. Rather, the results fit with the holistic approach that the course providers talked about in our discussions with them about their courses. It also fits with the evidence that the participants particularly valued the opportunity to reflect on where they were in their lives and where they wanted to go. In this sense the courses provided an impetus and/or space for those discussions and reflections. Ensuring sufficient time and space for these reflective practices is something that any future courses should build in.

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# APPENDIX A

## COURSE PROVIDERS

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### AGE & OPPORTUNITY

An Irish national organisation which inspires and empowers people to live healthy and fulfilling lives, with a goal of turning the period from age 50 onwards into one of the most satisfying times of life. Age & Opportunity are developing and testing a new programme (including materials and a range of delivery methodologies) that will build resilience in people aged 50+ to enable them to navigate later life transitions.

### BETH JOHNSON FOUNDATION

The Beth Johnson Foundation is a development organisation based in North Staffordshire that is testing new approaches for improving the quality of life for people as they age. The Foundation is training volunteer peer coaches in Cognitive Behavioural Therapy (CBT) and mindfulness techniques which they will use themselves, as well as cascade out to the wider population of older people.

### CENTRE FOR POLICY ON AGEING

The Centre for Policy on Ageing is exploring partnerships which view transitions as part of its strategic mission to deliver experiential courses to mid-life peers. These courses are based on real-life storytelling and coaching to develop emotional resilience and self-direction. The course culminates in a celebration of new ideas for making the most of the 50+ years and a methodology for identifying opportunities for this locally.

### CHESHIRE AND WIRRAL PARTNERSHIP NHS TRUST (CWP)

To improve the mental and emotional wellbeing and resilience of their staff, CWP runs a practical and thought-provoking two-day, person-led workshop aimed at NHS support staff aged between 50 and 75. The workshop provides tools and techniques to increase wellbeing, identify positive emotion, maintain positive relationships, and develop meaning and a sense of accomplishment.

### MANCHESTER MIND

A locally based mental health charity delivering a range of interventions to alleviate some of the key risk factors for poor mental health. Manchester Mind delivers six-week interventions based on positive psychology and Cognitive Behavioural Therapy (CBT) to equip participants with specific skills that are proven to improve people's mental wellbeing and develop resilience.

### WORKERS' EDUCATIONAL ASSOCIATION (SCOTLAND)

A national voluntary sector provider of adult education in workplaces and communities across Scotland. Its project incorporates mindfulness and creative approaches, including reflective and expressive writing and nature connection to enhance health and wellbeing. This work is being delivered through Employer Wellbeing Awareness Raising sessions, participant taster sessions, wellbeing courses and the formation of participant groups.

# APPENDIX B

## BASELINE QUESTIONNAIRE

### A About you

Before we begin, here are some questions that allow us to ensure that the information you give us will be completely anonymised and confidential

|  |  |
|--|--|
| <b>1. Please give us the first two letters of your father’s first name</b> |  |
|--|--|

|  |  |
|--|--|
| <b>2. Please give us the number of the month of your birth, e.g. August = 08</b> |  |
|--|--|

|   |  |
|---|--|
| <b>3. Please give us the first two letters of your mother’s maiden name</b> |  |
|---|--|

|   |  |
|---|--|
| <b>4. Please tell us how many siblings you have</b> |  |
|---|--|

|  |                       |
|--|-----------------------|
| <b>5. Please could you tell us what gender you identify with. Please tick one box only</b> |                       |
| Female   | <input type="radio"/> |
| Male   | <input type="radio"/> |
| Transgender  | <input type="radio"/> |
| Prefer not to say  | <input type="radio"/> |

|   |       |
|---|-------|
| <b>6. How old were you last birthday?<br/>Please specify your age at your last birthday</b> |       |
|   | years |

|  |
|--|
| <b>7. Please specify your occupational title. (Occupations will be grouped into standard occupational classifications by the research team. No individual occupational titles will appear in the analyses or report)</b> |
|  |

|  |                       |            |
|--|-----------------------|------------|
| <b>8. Please indicate which of the following ethnic groups you most closely identify with. Please only tick one box.</b> |                       |            |
| White  | <input type="radio"/> | Go to 8A → |
| Mixed/multiple ethnic groups   | <input type="radio"/> | Go to 8B → |
| Asian/Asian British  | <input type="radio"/> | Go to 8C → |
| Black / African / Caribbean / Black British  | <input type="radio"/> | Go to 8D → |
| Other ethnic group   | <input type="radio"/> | Go to 8E → |

|   |                       |
|---|-----------------------|
| <b>8A. Please indicate which of the following <u>White</u> groups you most closely identify with. Please only tick one box.</b> |                       |
| English / Welsh / Scottish / Northern Irish / British   | <input type="radio"/> |
| Irish   | <input type="radio"/> |
| Gypsy or Irish Traveller  | <input type="radio"/> |
| Any other White background  | <input type="radio"/> |
| Please specify:   |                       |

| <b>8B. Please indicate which of the following Mixed/multiple ethnic groups you most closely identify with. Please only tick one box.</b> |                       |
|--|-----------------------|
| White and Black Caribbean  | <input type="radio"/> |
| White and Black African  | <input type="radio"/> |
| White and Asian  | <input type="radio"/> |
| Any other  | <input type="radio"/> |
| Please specify:  |                       |

| <b>8C. Please indicate which of the following Mixed/multiple ethnic groups you most closely identify with. Please only tick one box.</b> |                       |
|--|-----------------------|
| Indian   | <input type="radio"/> |
| Pakistani  | <input type="radio"/> |
| Bangladeshi  | <input type="radio"/> |
| Chinese  | <input type="radio"/> |
| Any other Asian background   | <input type="radio"/> |
| Please specify:  |                       |

| <b>8D Please indicate which of the following Black/African/Caribbean/Black British groups you most closely identify with. Please only tick one box.</b> |                       |
|---|-----------------------|
| African   | <input type="radio"/> |
| Caribbean   | <input type="radio"/> |
| Any other Black / African / Caribbean background, write in  | <input type="radio"/> |
| Please specify:   |                       |

| <b>8E. Please indicate which of the following Other ethnic groups you most closely identify with. Please only tick one box.</b> |                       |
|---|-----------------------|
| Arab  | <input type="radio"/> |
| Any other ethnic group.   | <input type="radio"/> |
| Please specify:   |                       |

| <b>9. What is your legal marital or same-sex civil partnership status?</b>          |                       |
|---|-----------------------|
| Never married and never registered a same-sex civil partnership                     | <input type="radio"/> |
| Married or in same-sex civil partnership  | <input type="radio"/> |
| Separated, but still legally married or in same-sex civil partnership               | <input type="radio"/> |
| Divorced or formerly in a same-sex civil partnership which is now legally dissolved | <input type="radio"/> |
| Widowed or a surviving partner from a same-sex civil partnership                    | <input type="radio"/> |

| <b>10. Which of the following qualifications do you have?</b>  |                       |
|--|-----------------------|
| 1-4 O levels/CSEs/GCSE (any grades), Entry Level, Foundation diploma   | <input type="radio"/> |
| NVQ Level 1, Foundation GNVQ, Basic Skills   | <input type="radio"/> |
| 5+ O levels(passes)/CSEs (grade 1)/GCSE (grades A+--C), School Certificate, 1 A level/2-3 AS levels/VCEs, Higher Diploma | <input type="radio"/> |
| NVQ Level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First / General Diploma, RSA Diploma                         | <input type="radio"/> |
| Apprenticeship   | <input type="radio"/> |
| 2+ A levels / VCEs, 4+ AS levels, Higher School Certificate, Progression / Advanced Diploma                              | <input type="radio"/> |



|   |                       |
|---|-----------------------|
| NVQ Level 3, Advanced GNVQ, City and Guilds Advanced Craft, ONC, OND, BTEC National, RSA Advanced Diploma | <input type="radio"/> |
| Degree (for example BA, BSc), Higher degree (for example MA, PhD, PGCE)                                   | <input type="radio"/> |
| NVQ Level 4 - 5, HNC, HND, RSA Higher Diploma, BTEC Higher Level  | <input type="radio"/> |
| Professional qualifications (for example teaching, nursing, accountancy)                                  | <input type="radio"/> |
| Other vocational / work-related qualifications  | <input type="radio"/> |
| Foreign qualifications  | <input type="radio"/> |
| No qualifications   | <input type="radio"/> |

**11. Please could you tell us how strongly you agree or disagree with the following statements**

|   | <b>Strongly disagree</b> | <b>Disagree</b>       | <b>I neither agree nor disagree</b> | <b>Agree</b>          | <b>Strongly agree</b> |
|---|--------------------------|-----------------------|-------------------------------------|-----------------------|-----------------------|
| I know what my strengths and weaknesses are   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I understand what makes me tick               | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I have a clear idea about what I want in life | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I know what I like                            | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I know what drives me                         | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |

**B About the course**
**1. How did you find out about the course? Please tick as many as apply**

|                                 |                       |
|---------------------------------|-----------------------|
| Email from the course organiser | <input type="radio"/> |
| Flyers/posters at work          | <input type="radio"/> |
| From a colleague                | <input type="radio"/> |
| From my supervisor/line manager | <input type="radio"/> |
| Other:                          | <input type="radio"/> |
| Please specify:                 |                       |

**2. What are your reasons for enrolling on the course? Please tick as many as apply**

|   |                       |
|---|-----------------------|
| To learn about pensions   | <input type="radio"/> |
| To prepare for retirement   | <input type="radio"/> |
| To reduce stress  | <input type="radio"/> |
| To meet colleagues  | <input type="radio"/> |
| Because others recommended it   | <input type="radio"/> |
| To receive information about how to manage later life transitions           | <input type="radio"/> |
| To learn how the organisation can support me to continue to work for longer | <input type="radio"/> |
| For personal development  | <input type="radio"/> |
| To have two days away from the office/ward                                  | <input type="radio"/> |
| Other   | <input type="radio"/> |
| Please specify:   |                       |

| <b>3. The course may cover a number of topics. We are interested to know how familiar you are with these topics before you start the course.</b> |   |  |   |  |   |
|--|---|--|---|--|---|
|  | <b>I am not familiar with this term</b> | <b>I am familiar with this, but I don't know what it means for me personally</b> | <b>I am familiar with this and I have a basic idea of what it means for me personally</b> | <b>I am familiar with this and I have a good idea of what it means for me personally</b> | <b>I am familiar with this and I have a very good idea of what it means for me personally</b> |
| Wellbeing  | <input type="radio"/>                   | <input type="radio"/>  | <input type="radio"/>   | <input type="radio"/>  | <input type="radio"/>   |
| Life transition  | <input type="radio"/>                   | <input type="radio"/>  | <input type="radio"/>   | <input type="radio"/>  | <input type="radio"/>   |
| Resilience   | <input type="radio"/>                   | <input type="radio"/>  | <input type="radio"/>   | <input type="radio"/>  | <input type="radio"/>   |
| Ageism   | <input type="radio"/>                   | <input type="radio"/>  | <input type="radio"/>   | <input type="radio"/>  | <input type="radio"/>   |
| Work-life balance  | <input type="radio"/>                   | <input type="radio"/>  | <input type="radio"/>   | <input type="radio"/>  | <input type="radio"/>   |
| Transferable skills  | <input type="radio"/>                   | <input type="radio"/>  | <input type="radio"/>   | <input type="radio"/>  | <input type="radio"/>   |
| Personality type   | <input type="radio"/>                   | <input type="radio"/>  | <input type="radio"/>   | <input type="radio"/>  | <input type="radio"/>   |
| Managing change  | <input type="radio"/>                   | <input type="radio"/>  | <input type="radio"/>   | <input type="radio"/>  | <input type="radio"/>   |
| Goal setting   | <input type="radio"/>                   | <input type="radio"/>  | <input type="radio"/>   | <input type="radio"/>  | <input type="radio"/>   |

## C Work and You

| <b>1. Here are some more statements about work. Please could you tell us how strongly you agree or disagree with these statements.</b> |                          |                       |                                     |                       |                       |
|--|--------------------------|-----------------------|-------------------------------------|-----------------------|-----------------------|
|  | <b>Strongly disagree</b> | <b>Disagree</b>       | <b>I neither agree nor disagree</b> | <b>Agree</b>          | <b>Strongly agree</b> |
| The most important things that happen to me involve my present job   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| To me, my job is only a small part of who I am   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I live, eat and breathe my job   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| Most of my interests are centred around my job   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I am able to discuss my working arrangements with my manager   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I feel happy with my work-life balance   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| Gaining skills to support my current job is important to me  | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| Gaining skills to be able to move to a different job is important to me  | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| When I look forward three years, I see myself working for the same employer  | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I have very strong ties with my present job which would be very difficult to break   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| Usually I feel detached from my job  | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| Most of my personal life goals are job-oriented  | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I consider my job to be very central to my life  | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I like to be really involved in my job most of the time  | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I receive help and support from coworkers when I need it   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| At work, I often feel anxious  | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| At work, I usually feel positive   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I am often lonely at work  | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I feel appreciated by my coworkers   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |
| I feel valued by the organisation I work for   | <input type="radio"/>    | <input type="radio"/> | <input type="radio"/>               | <input type="radio"/> | <input type="radio"/> |

## D Retirement

**1. Here are a number of statements about retirement. Please could you tell us how strongly you agree or disagree that these statements apply to you. Please be as honest and accurate as you can throughout. Try not to let your response to one statement influence your responses to other statements. There are no “correct” or “incorrect” answers. Answer according to your own feelings, rather than how you think “most people” would answer.**

|  | Strongly disagree     | Disagree              | I neither agree nor disagree | Agree                 | Strongly agree        |
|--|-----------------------|-----------------------|------------------------------|-----------------------|-----------------------|
| Retirement will be a time to rest                                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| Retirement will be a time to slow down                             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| Retirement will be a time to relax                                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| Retirement will be a time to set to work on long-awaited goals     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| Retirement will be the welcome beginning of a new stage of my life | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| Retirement will be a time to do what I want                        | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| My life after retirement will be very similar to my life now       | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| Retirement won't be a big issue for me                             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I don't think retirement will be a major change                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| The only change when I retire will be that I have more time        | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| When I retire, I won't know what to do with my time                | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| Nothing will be able to replace work in my life                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| Retirement will mean making the best of an unwanted situation      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| Retirement will be a period of frustration                         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I have the tools I need to assess my financial needs in retirement | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I have the tools I need to assess my social needs in retirement    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I have the tools I need to assess my personal needs in retirement  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I feel anxious about retirement                                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |

## E Goals and plans

**1. Here are a number of general statements about attitudes to change. Please could you tell us who strongly you agree or disagree with each of the statements**

|  | Strongly disagree     | Disagree              | I neither agree nor disagree | Agree                 | Strongly agree        |
|--|-----------------------|-----------------------|------------------------------|-----------------------|-----------------------|
| I like having a stable routine in my life                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I generally avoid change in my life                        | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I am always looking for new opportunities in my life       | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| When things don't go according to plan, it stresses me out | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| Once I've made plans, I'm not likely to change them        | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I don't feel that I need to control everything in my life  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I cope well with unexpected change                         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |

|  |                       |                       |                       |                       |                       |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I find it easy to adapt my plans if things don't work out as I had hoped             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Even if things don't go to plan, I am able to make the best of the situation         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Most things work out well in the end   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I find it difficult to cope with changes in my life                                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I always try to find the positive in things, even if they didn't work out as planned | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

**2. In the last month how often, if at all, have you discussed your plans for the future with anyone?**

| Not at all            | Rarely                | Sometimes             | Often                 | Very frequently       |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

**3. Please tell us the extent to which you have clear goals that you want to achieve in the following areas using the scale from 0 (no goals at all) to 10 (very clear goals)**

|                     | 0                     | 1                     | 2                     | 3                     | 4                     | 5                     | 6                     | 7                     | 8                     | 9                     | 10                    |
|---------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Career/job          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Health              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Learning or study   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Finances            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Relationships       | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Volunteering        | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Hobbies or pastimes | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

## F Attitudes

**1. Please could you tell us how strongly you agree or disagree that these statements apply to you.**

|   | Strongly disagree     | Disagree              | I neither agree nor disagree | Agree                 | Strongly agree        |
|---|-----------------------|-----------------------|------------------------------|-----------------------|-----------------------|
| In uncertain times, I usually expect the best               | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| It's easy for me to relax                                   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| If something can go wrong for me, it will                   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I'm always optimistic about my future                       | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I enjoy my friends a lot                                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| It's important for me to keep busy                          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I hardly ever expect things to go my way                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I don't get upset too easily                                | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I rarely count on good things happening to me               | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| Overall, I expect more good things to happen to me than bad | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I am as kind to myself as I am to others                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |

**2. Here are a number of statements about ageing. Please could you tell us how strongly you agree or disagree with these statements.**

|   | Strongly disagree     | Disagree              | I neither agree nor disagree | Agree                 | Strongly agree        |
|---|-----------------------|-----------------------|------------------------------|-----------------------|-----------------------|
| Things keep getting worse as I get older      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I have as much energy as I did last year      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| As you get older, you are less useful         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |
| I am as happy now as I was when I was younger | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>        | <input type="radio"/> | <input type="radio"/> |

**3. Below are three different statements about how people might feel about growing older. Please indicate which one most closely describes your own feelings. Please choose only one option.**

|   |                       |
|---|-----------------------|
| As I get older, things are <u>better</u> than I thought they would be | <input type="radio"/> |
| As I get older, things are <u>worse</u> than I thought they would be  | <input type="radio"/> |
| As I get older, things are <u>the same</u> as I thought they would be | <input type="radio"/> |

**4. Please could you tell us how often these statements apply to you.**

|  | Almost Never          | Rarely                | Sometimes             | Often                 | Almost always         |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I try to be understanding and patient towards those aspects of my personality I don't like | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I'm kind to myself when I'm experiencing suffering   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| When I'm going through a very hard time, I give myself the caring and tenderness I need    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I'm tolerant of my own flaws and inadequacies  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I try to be loving towards myself when I'm feeling emotional pain                          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| When I see aspects of myself that I don't like, I get down on myself                       | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| When times are really difficult, I tend to be tough on myself                              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I can be a bit cold-hearted towards myself when I'm experiencing suffering                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I'm disapproving and judgmental about my own flaws and inadequacies                        | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I'm intolerant and impatient towards those aspects of my personality I don't like.         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

## G Social relations

| <b>1. Here are a number of statements about feelings and relationships with others. Please answer on a scale from 0 to 10 where 0 is 'not at all' and 10 is 'completely'.</b> |                       |                       |                       |                       |                       |                       |                       |                       |                       |                       |                       |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
|   | 0                     | 1                     | 2                     | 3                     | 4                     | 5                     | 6                     | 7                     | 8                     | 9                     | 10                    |
| Overall, how satisfied are you with your relationships with friends?  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Overall, how satisfied are you with your relationships with family, including spouse/partner?   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Do you have anyone that you can ask for help?   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Do you have anyone that you can confide in?   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Is there someone who makes you feel valued?   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| How lonely do you feel in your daily life?  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

## H Health and Wellbeing

| <b>1. Next we would like to ask you four questions about your feelings on aspects of your life. There are no right or wrong answers. For each of these questions please give an answer on a scale of 0 to 10, where 0 is 'not at all' and 10 is 'completely'</b> |                       |                       |                       |                       |                       |                       |                       |                       |                       |                       |                       |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
|  | 0                     | 1                     | 2                     | 3                     | 4                     | 5                     | 6                     | 7                     | 8                     | 9                     | 10                    |
| Overall, how satisfied are you with your life?   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Overall, to what extent do you feel that the things you do in your life are worthwhile?  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Overall, how happy did you feel yesterday?   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Overall, how anxious did you feel yesterday?   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| <b>2. Would you say your health is...</b> | <b>Excellent</b>      | <b>Very good</b>      | <b>Good</b>           | <b>Fair</b>           | <b>Poor</b>           |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
|   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

If you would like to expand on any of your answers or tell us about something we have not covered in our questions, please feel free to do so here:

**Thank you very much for your cooperation**

# APPENDIX C

## MEASURES USED

### GOAL CLARITY

At both the baseline questionnaire (T<sub>1</sub>) and in the follow-up questionnaires (T<sub>2</sub>, T<sub>3</sub> and T<sub>4</sub>) respondents were asked, on a scale of 0-10, how clear their goals were across a number of dimensions: career/job, health, learning or study, finances, relationships, volunteering, and hobbies or pastimes. From this we were able to calculate change in goal clarity between the baseline and subsequent waves and then grouped respondents into one of three groups: i) those whose goals became less clear between T<sub>1</sub> and each follow up wave; ii) those who had no change in goal clarity; and iii) those whose goals became clearer between T<sub>1</sub> and each of the follow up waves.

### WELLBEING

To measure wellbeing, we used the Office of National Statistics Wellbeing measure which is recommended for use by the What Works Wellbeing unit in the UK. This is composed of four questions: i) Overall, how satisfied are you with your life?; ii) Overall, to what extent do you feel that the things you do in your life are worthwhile?; iii) Overall, how happy did you feel yesterday?; and iv) Overall, how anxious did you feel yesterday?. Respondents are asked to rate each of these on a 0-10 scale, where 0 means not at all and 10 means completely. The fourth item is then reversed coded and all four items are summed to create a wellbeing index ranging from 0 to 40. Low scores equal low wellbeing and high scores equal high wellbeing.

### JOB INVOLVEMENT

Job involvement was assessed with a Job Involvement Questionnaire. The scale is made up 10 items, e.g. 'The most important things that happen to me involve my present job'; 'I live, eat and breathe my job'; and 'Most of my interests are centred around my job', etc. This scale aims to capture how important work is for a person. Responses to each item are measured on a 5-point Likert scale ranging from (1) disagree to (5) agree. These items are then summed to produce a range score from 0-50 with a higher score indicating a higher level of job involvement.

### ATTITUDES TO RETIREMENT

To measure attitudes to retirement, we used the Retirement Expectation Inventory (REI). This was designed to reflect the multi-dimensional nature of retirement. The inventory is composed of 20 questions which cover the following four dimensions of retirement: Transition to Rest; New Beginning; Continuity; and Imposed Disruption. However, in order to reduce the burden on respondents, we reduced the scale to four items, one from each of the domains. These were: 'Retirement will be a time to rest'; 'Retirement will be a time to do what I want'; 'My life after retirement will be very similar to my life now'; and 'Nothing will be able to replace work in my life'. A higher score represents more positive attitudes towards retirement.

### ACCEPTANCE OF CHANGE

To measure acceptance of change, we adapted questions from the Resistance to Change Scale. This has been designed to measure an individual's inclination to resist changes. The original scale is composed of 23 questions. However, to reduce respondent burden we reduced this to 12 items and re-worded a number of the original items. Examples of the questions that we used in this scale are: 'I generally avoid change in my life'; 'I am always looking for new opportunities in my life'; and 'When things don't go according to plan, it stresses me out'. A higher score represents greater acceptance of change.

### SELF-KINDNESS

We measured self-kindness using the self-kindness subscale from the Self-Compassion Scale. The measure included the following questions: 'I try to be understanding and patient towards those aspects of my personality I don't like'; 'I'm kind to myself when I'm experiencing suffering'; 'When I'm going through a very hard time'; 'I give myself the caring and tenderness I need'; 'I'm tolerant of my own flaws and inadequacies'; and 'I try to be loving towards myself when I'm feeling emotional pain'. A higher score represents more self-kindness.

## SELF-JUDGEMENT

We measured self-judgement using the self-judgement subscale from the Self-Compassion Scale. The measure included the following questions: 'I try to be understanding and patient towards those aspects of my personality I don't like'; 'I'm kind to myself when I'm experiencing suffering'; 'When I'm going through a very hard time, I give myself the caring and tenderness I need'; 'I'm tolerant of my own flaws and inadequacies'; and 'I try to be loving towards myself when I'm feeling emotional pain'. A higher score reflects less self-judgement

## ATTITUDES TO AGEING

To measure attitudes to ageing, we used Attitudes Toward Own Aging subscale. This subscale consists of the following items: 'Things keep getting worse as I get older'; 'I have as much energy as I did last year'; 'As you get older, you are less useful'; 'I am as happy now as I was when I was younger'; and 'As I get older, things are (better than, worse than, or the same) as I thought they would be'. A higher score reflects more positive attitudes to ageing.

## QUALITY OF SOCIAL RELATIONSHIPS

The five questions on the quality of social relationships are a mix of questions from the English Longitudinal Study of Ageing and some original questions developed especially for this project. These include: 'Overall, how satisfied are you with your relationships with friends?'; 'Overall, how satisfied are you with your relationships with family, including spouse/partner?'; and 'Do you have anyone that you can confide in?'. Each question is measured on a 10-point scale producing a possible range of 0-50. A higher score represents a higher quality of social relationships.



## APPENDIX D

### HARMONISING COURSE ACTIVITIES

| <b>CWP Exercise</b>                                | <b>A&amp;O Exercise</b>                       | <b>Combined name</b> |
|--|---|----------------------|
| Reflective thinking                                | Labyrinth                                     | Reflection           |
| Identifying life transitions                       | Transitions Event Questionnaire               | Transitions          |
| River of life exercises/Life transitions time line | River of Life                                 | River of Life        |
| Skills audit                                       | Transferable Skills                           | Skills               |
| Philosophy of life session                         | Mid to Later Life Review                      | Review               |
| Personality Cards exercise                         | Personality Types                             | Personality          |
| Identifying individual drivers                     | Four Planning Types                           | Drivers              |
| Relationships exercise                             | Circle of Friends<br>What supports do I have? | Relationships        |
| Identifying areas for improvement in wellbeing     | Cultivating Optimism                          | Optimism             |
| Resilience exercise                                | Resilience Sheets                             | Resilience           |
| Personal goal setting exercise                     | Writing a card to myself                      | Goals                |

# APPENDIX E

## METHODOLOGY

### STUDY DESIGN

We collected both quantitative and qualitative data in order to capture a wide range of participants' experience of the courses and its impact on their lives. To look at the short- and medium-term effects of attending the courses, we collected data at four different time points: at baseline before the courses start (T<sub>1</sub>); two weeks following the end of the courses (T<sub>2</sub>); three months after the end of the courses (T<sub>3</sub>); and six months after the end of the courses (T<sub>4</sub>). The same data was collected from participants in the Working Longer and Living Life to the Full and Changing Gears courses.

The baseline (T<sub>1</sub>) questionnaire, the participant information sheet and the consent forms were given to the respondents on the first day of the courses, before the sessions began. The baseline questionnaire was a self-completion, paper-and-pen questionnaires (see Appendix B). Respondents who consented to be part of the study filled out their questionnaire privately and then put it in to an envelope that was provided for them. Consent forms were kept in separate envelopes to prevent any identification of the respondents. Both of these were then collected by the courses provider and sent to Dr Elizabeth Evans for data entry. Those who filled in this baseline questionnaire were invited to remain in the study and, if they chose to do so, were asked to provide their email addresses so they could be surveyed at future time points using an online survey.

We elected to use an online survey to reduce the burden on the respondent from having to post back the questionnaire and also from having to answer irrelevant questions. Using an online platform, we were able to ensure that respondents were only asked relevant questions as the program allowed us to route respondents through the survey based on their specific course. It was also hoped that, by tailoring the questionnaire to the experience of the respondent, we would achieve a higher response and retention rate for the survey, as opposed to being asked generic questions about the courses which seem impersonal and irrelevant. The online survey also affords the respondent more flexibility to complete the questionnaire, which we also felt would improve response and retention rates. This also allowed the research team to send email reminders to those who had not completed their surveys. The questionnaires at T<sub>2</sub>, T<sub>3</sub> and T<sub>4</sub> omitted the socio-demographic questions that were included at T<sub>1</sub>. In addition, course evaluation questions were included in the questionnaire at T<sub>2</sub>; and questions about activities that had been taken up since the course were asked in the questionnaires at T<sub>2</sub>, T<sub>3</sub> and T<sub>4</sub>.

Consultations were held with the course providers and funders in order to identify anticipated outcomes for participants of the courses. These were: Self-Kindness, Well Being, Acceptance of Change, Attitudes to Ageing, Self-Judgement, Quality of Social Relationships, Job Involvement and Attitudes to Retirement (see Appendix C for a full description of the measures). To capture these outcomes, we used a range of standardised measures. We were interested in looking at whether respondent's scores in these key outcomes improved, remained the same or declined following the courses. Hence, we asked the same sets of questions before the courses started (at T<sub>1</sub>) and again at the follow ups (T<sub>2</sub>, T<sub>3</sub> and T<sub>4</sub>). This means we can look at individual change (rather than just aggregate change for the group). The only differences were that we dropped the socio-demographic questions, added in the course evaluation questions at T<sub>2</sub> and added the activities since course at T<sub>2</sub>-T<sub>4</sub>.

In addition to the survey data we conducted 15 qualitative semi-structured interviews with participants. These were drawn from those who responded at T<sub>2</sub> and carried out within four months of the end of the course. UK-based respondents were given the choice to have an interview in person or via the telephone. All but one of the respondents opted for the telephone interview. All of the respondents based in Ireland were interviewed by telephone due to travel costs. The interviews were designed to enable the research team to explore individual variation in outcomes and participants' experience of the courses and their sense of what impact, if any, it has had on them and to identify possible mechanisms for change. The interviews were structured around a topic guide, which is a list of topics the interviewer wishes to discuss. These topics were developed through discussions with the course providers and funders. However, as the purpose of the interviews was to gain a thorough understanding of the participants' experiences, the interviewees were encouraged to talk freely and lead the conversation. Thus, although interviews were semi-structured and organised around a number of broad themes, the interviews went with the flow of conversation rather than being prescriptive. Pseudonyms have been used throughout the report to ensure the anonymity of the respondents.

In order to ensure sufficient numbers for our analyses, we have combined the data from the two courses. This was possible as the same questions were asked almost exactly the same order to the participants from each of the courses. The only difference between the questionnaires administered was that for the evaluation of the A&O course we included a scale to measure resilience. However, in discussions with the CWP course providers and on the basis of previous research done at the CWP which showed that staff had persistently high levels of resilience we decided not to include this in the questionnaire for CWP participants.

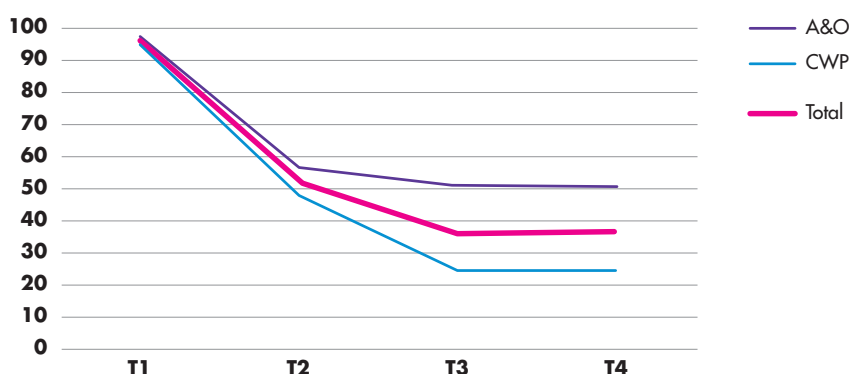
## RESPONSE AND RETENTION RATES

All of those who attended the courses were invited to participate in the study. Initial response rates at baseline were very high, 95% for the CWP course and 97% for the A&O course. The initial sample size was 157.

However, keeping people in the study is a key issue in any longitudinal study. Hence it is important to look at the retention rate, e.g. the proportion of those who responded to the subsequent questionnaires. Low levels of retention are not only an issue because they result in a smaller sample size, thus limiting the complexity of the analyses that can be done, but they can also result in a very selective or biased sample if only certain types of people respond. As noted above, participants who returned their baseline questionnaire were invited to remain in the study to be surveyed at later dates. If they were interested in doing so, they were asked to supply their email address, so that they could be contacted. Seven A&O respondents refused to supply email addresses. Hence these have been removed from the calculation of the retention rates as they were never 'at risk' of being included in subsequent waves.

Figure E.1 shows the response and retention rates for the two courses individually and the combined rates. As can be seen by T<sub>2</sub> only around half of the respondents gave us information. This stabilised somewhat for the A&O participants at that point. Such a drop in numbers between T<sub>1</sub> and T<sub>2</sub>, whilst not ideal, is not unusual in longitudinal studies. However, the figures for show that the retention rates continued to fall for the CWP participants and by T<sub>3</sub> just under 25% filled in the questionnaires. It is possible that this was because, for several of the CWP courses, the T<sub>3</sub> follow-up fell during the summer holidays. To account for this, we sent out additional reminders to these groups but we received very few responses.

**FIGURE E.1. Response rates at baseline and retention rates at subsequent follow-ups for CWP participants, A&O participants and for the combined sample as a whole**



The drop in retention rate is a potential concern not just because it reduces the sample size, but because it raises the aforementioned concerns about possible bias. In order to test this, we have looked at the baseline values for the key outcome measures for those who did and did not respond at each wave to see if there are any notable differences, e.g. are those with higher levels of wellbeing more likely to remain in the study? Reassuringly, the results from these analyses, presented in [Table E.1](#)

show that there are very few notable differences in the baseline values for those who did and did not respond at the various waves. Perhaps the only consistent difference is that responders seem to have clearer career goals than non-responders. Aside from that, there are no clear and consistent differences. As such, we feel confident that there the drop in retention rates has no introduced any bias into the sample.

**TABLE E.1. Mean values for key outcome measures at baseline for those who did and did not respond at each follow-up (T2-T4)**

|   |                         | <b>T2</b> | <b>T3</b> | <b>T4</b> |
|---|-------------------------|-----------|-----------|-----------|
| <b>Mean Well Being score at T1</b>                      | Responded in wave       | 29.00     | 26.45     | 28.37     |
|   | Did not respond in wave | 28.77     | 30.52     | 29.16     |
| <b>Mean Job Involvement score at T1</b>                 | Responded in wave       | 30.61     | 30.19     | 29.67     |
|   | Did not respond on wave | 29.59     | 30.02     | 30.32     |
| <b>Mean Attitudes to Retirement score at T1</b>         | Responded in wave       | 12.37     | 12.45     | 12.33     |
|   | Did not respond on wave | 13.08     | 12.91     | 12.94     |
| <b>Mean Acceptance of Change score at T1</b>            | Responded in wave       | 39.92     | 38.48     | 39.93     |
|   | Did not respond on wave | 38.95     | 40.07     | 39.16     |
| <b>Mean Self-Kindness score at T1</b>                   | Responded in wave       | 14.89     | 13.81     | 14.74     |
|   | Did not respond on wave | 13.49     | 14.43     | 13.88     |
| <b>Mean Self-Judgement score at T1</b>                  | Responded in wave       | 15.68     | 15.13     | 16.00     |
|   | Did not respond on wave | 14.95     | 15.43     | 14.94     |
| <b>Mean Attitudes to Ageing score at T1</b>             | Responded in wave       | 14.05     | 13.77     | 14.07     |
|   | Did not respond on wave | 13.95     | 14.15     | 13.96     |
| <b>Mean Quality of Social Relationships score at T1</b> | Responded in wave       | 41.03     | 37.52     | 38.56     |
|   | Did not respond on wave | 37.85     | 40.70     | 39.88     |
| <b>Mean Career/job goal clarity at T1</b>               | Responded in wave       | 6.68      | 6.61      | 6.48      |
|   | Did not respond on wave | 5.05      | 5.35      | 5.52      |
| <b>Mean Health goal clarity at T1</b>                   | Responded in wave       | 7.37      | 7.10      | 7.15      |
|   | Did not respond on wave | 7.49      | 7.65      | 7.58      |
| <b>Mean Learning or study goal clarity at T1</b>        | Responded in wave       | 5.39      | 4.84      | 4.85      |
|   | Did not respond on wave | 3.74      | 4.37      | 4.40      |
| <b>Mean Finances goal clarity at T1</b>                 | Responded in wave       | 6.58      | 5.97      | 6.52      |
|   | Did not respond on wave | 6.00      | 6.50      | 6.16      |
| <b>Mean Relationships goal clarity at T1</b>            | Responded in wave       | 7.55      | 7.16      | 7.30      |
|   | Did not respond on wave | 6.67      | 7.07      | 7.00      |
| <b>Mean Hobbies or pastimes goal clarity at T1</b>      | Responded in wave       | 6.84      | 6.35      | 6.85      |
|   | Did not respond on wave | 6.51      | 6.89      | 6.58      |

## ANALYTICAL APPROACH

In order to explore whether participation in the course had an impact on the key outcomes, we created a change score for each of the outcomes measured in the survey by subtracting the score at baseline from the score at each follow-up. A positive score represents an increase, a score of 0 represents no change and a negative score represents a decrease.

All of the outcomes are coded in such a way that an increase represents a positive change, e.g. an improvement in self-kindness means that the person is kinder to themselves and an improvement in self-judgement means that the person is less judgemental about themselves. We then divided respondents into three groups according to whether they experienced an improvement, a decline or no change in each of the outcomes.

We decided to take this approach rather than simply report mean values for the scales at each wave or even mean values for change as we were particularly interested to see if the course might have negative as well as positive results for certain people or groups. Using mean scores could mask these differences if there was one group which had positive outcomes and another group had negative outcomes.

As this was not a random sample, it made no sense to use any tests for statistical significance. Moreover, the relatively small sample size prevents us from conducting multivariate analyses (especially at the later follow-ups) so it would be impossible to rule out any potentially confounding relationships in our analyses. For these reasons, we have relied on presenting the proportions and noting those results that we think are important.

For the interview data, we used a thematic analysis approach (Braun & Clarke, 2006) in which data were coded line by line, interrogated and categorised both deductively and inductively. First, the transcripts were read through for familiarisation and immersion. Using a deductive approach, transcripts were coded using code categories that were derived a priori from an initial list of topics that came from discussions with the funders and course providers. However, as it was important not to lose relevant data, an inductive approach was taken for segments of text that did not fit within the initial code categories.

During this process, new codes were assigned to data that was either separate from or expanded upon the initial code categories. Next, codes were grouped together to support the a priori themes derived from anticipated outcomes (such as ageism awareness, sense of control, confidence to plan and identifying skills) or to create emergent themes (such as meeting expectations and course delivery). Through a process of re-reading and consultation within the research team, these themes were refined and interpreted. This was an iterative process of constant comparison allowing the emergence of concepts that were examined in the context of other transcripts. Patterns were identified and differences and similarities between groups were examined.

## LIMITATIONS

There are a number of limitations to this study that are important to note. The main issue is that there is no control group against which to compare those who took the courses. Unfortunately, as the courses had already been set up before the funding for this project started the research team had no opportunity to inform this part of the project. Because of this, it is impossible to say conclusively that these courses had an impact on outcomes as opposed to any other activity that staff could have done for the same period of time. Put differently, we are unable to rule out that the results are simply due to having some time away from work regardless of the activity that was done or whether any improvements in outcomes were simply a result of a secular improvement across the whole organisation. However, in order to try to assess the latter of these issues we were able to access data from the annual staff surveys at the CWP Trust. These are conducted in the autumn of each year so we were able to get data that correspond to a few months before the start of the evaluation and to the end of the evaluation study period.

We have just focussed on the age group 51-65 years as this generally matches with the age range of the participants. From the possible questions that were asked in the CWP staff survey, we were able to identify some that measured issues around: i) attitudes to work/job; ii) health and wellbeing; and iii) training and development.

We felt that these were similar to some of the key outcomes that were included in the evaluation survey. The results, presented in **Table E.2**, show that there was very little change in any of the items measured between the two time points. Whilst this is not definitive proof that the courses led to changes in outcomes (i.e. the items are not directly comparable and the data are only available for the CWP participants), it does suggest that the results are not due to a general, secular shift in work and wellbeing within the health service. Nonetheless, we would strongly recommend that any future evaluation of these courses should build in control groups to avoid this problem.

The second issue is the relatively low retention rate. As noted, this is an inevitable part of any longitudinal study, but things could have been done to minimise this. As part of the funding for the courses all course providers attended a series of learning events. We feel that had we been able to attend some of these events early on in the project we could have discussed the research better with the course providers, answered any questions and worked with them to find solutions to improve retention rates. Certainly, on the basis of our results we would recommend that any future evaluation tries hard to avoid having follow-ups during the summer holidays.

Finally, as with all surveys, there was a tension between the number of outcomes to be measured and the burden on the respondent. During the development of the questionnaires course providers consistently expressed concerns that the questionnaire was too long. Hence, we dropped a number of questions. In retrospect we feel that this might have been a mistake. We had very few partially completed questionnaires, which suggests that once people agreed to do it, they did not find the length of the questionnaire to be a problem. By dropping some of the initial questions this prevented us from being able to assess some key issues. We would certainly recommend that any future evaluation include questions on work-life balance and expected age of retirement.

**TABLE E.2. Change in attitudes to work, health and wellbeing and personal development amongst healthcare workers aged 51-65 2017-2018: CWP Staff Survey (%)**

|  |  | 2017 | 2018 |
|--|--|------|------|
| <b>Your job</b>  | Often/always look forward to going to work   | 59   | 65   |
|  | Often/always enthusiastic about my job   | 75   | 78   |
|  | Always know what work responsibilities are   | 88   | 87   |
|  | Feel trusted to do my job  | 93   | 93   |
|  | Able to do my job to a standard I am pleased with  | 81   | 82   |
|  | Opportunities to show initiative frequent in my role   | 76   | 74   |
|  | Able to make suggestions to improve the work of my team/dept   | 78   | 79   |
|  | Involved in deciding changes that affect work  | 56   | 53   |
|  | Able to make improvements happen in my area of work  | 57   | 58   |
|  | Able to meet conflicting demands on my time at work  | 44   | 44   |
|  | Have adequate materials, supplies and equipment to do my work  | 52   | 51   |
|  | Enough staff at organisation to do my job properly   | 31   | 30   |
|  | Team members have a set of shared objectives   | 73   | 75   |
|  | Team members often meet to discuss the team's effectiveness  | 65   | 66   |
|  | Satisfied with recognition for good work   | 57   | 60   |
|  | Satisfied with support from immediate manager  | 76   | 73   |
|  | Satisfied with support from colleagues   | 87   | 88   |
|  | Satisfied with amount of responsibility given  | 78   | 78   |
|  | Satisfied with opportunities to use skills   | 74   | 74   |
|  | Satisfied with extent organisation values my work  | 45   | 46   |
| Satisfied with level of pay                                | 34   | 44   |      |
| Satisfied with opportunities for flexible working patterns | 51   | 52   |      |
| <b>Your health, wellbeing and safety at work</b>           | Organisation definitely takes positive action on health and wellbeing                                  | 39   | 39   |
|  | In last 12 months, have not experienced musculoskeletal (MSK) problems as a result of work activities  | 77   | 78   |
|  | Not felt unwell due to work related stress in last 12 months   | 61   | 63   |
|  | In last 3 months, have not come to work when not feeling well enough to perform duties                 | 44   | 45   |
|  | Not felt pressure from manager to come to work when not feeling well enough                            | 83   | 83   |
|  | Not felt pressure from colleagues to come to work when not feeling well enough                         | 89   | 89   |
|  | Don't work any additional paid hours per week for this organisation, over and above contracted hours   | 77   | 75   |
|  | Don't work any additional unpaid hours per week for this organisation, over and above contracted hours | 43   | 38   |
| <b>Your personal development</b>                           | Had training, learning or development in the last 12 months  | 72   | 68   |
|  | Had appraisal/KSF review in last 12 months   | 93   | 91   |
|  | Appraisal/review definitely helped me improve how I do my job  | 20   | 20   |
|  | Clear work objectives definitely agreed during appraisal   | 29   | 29   |
|  | Appraisal/performance review: definitely left feeling work is valued                                   | 27   | 29   |
|  | Appraisal/performance review: organisational values definitely discussed                               | 28   | 31   |
|  | Appraisal/performance review: training, learning or development needs identified                       | 60   | 64   |
|  | Supported by manager to receive training, learning or development definitely identified in appraisal   | 59   | 62   |
|  | Would recommend organisation as place to work  | 59   | 61   |
| <b>N</b>   |  | 641  | 650  |

## APPENDIX F

### CORRELATION BETWEEN HOW USEFUL THE PARTICIPANTS FOUND THE COURSE ACTIVITIES AND CHANGE IN OUTCOMES AT EACH FOLLOW-UP (T2, T3 AND T4)

Notable correlations are in bold

|               | Well Being   | Job Involvement | Attitudes to Retirement | Acceptance of Change | Self-Kindness | Self-Judgement | Attitudes to Ageing | Quality of Social Relationships |
|---------------|--------------|-----------------|-------------------------|----------------------|---------------|----------------|---------------------|---------------------------------|
|               | <b>T1-T2</b> |                 |                         |                      |               |                |                     |                                 |
| Reflection    | 0.13         | -0.18           | 0.02                    | 0.04                 | 0.04          | -0.09          | -0.08               | -0.06                           |
| Transitions   | 0.04         | -0.19           | 0.02                    | 0.09                 | -0.05         | 0.05           | 0.08                | 0.11                            |
| River of Life | 0.01         | -0.14           | -0.01                   | 0.21                 | 0.01          | 0.05           | 0.04                | -0.07                           |
| Skills        | 0.22         | -0.12           | 0.04                    | -0.01                | -0.12         | -0.11          | 0.28                | 0.21                            |
| Review        | 0.21         | -0.09           | -0.11                   | 0.01                 | -0.13         | 0.02           | 0.17                | 0.14                            |
| Personality   | 0.05         | 0.00            | -0.16                   | -0.01                | 0.02          | 0.00           | 0.15                | 0.14                            |
| Drivers       | 0.28         | -0.06           | -0.03                   | 0.02                 | 0.10          | -0.10          | 0.09                | 0.16                            |
| Relationships | 0.21         | -0.13           | 0.11                    | 0.17                 | -0.04         | 0.04           | 0.06                | 0.13                            |
| Optimism      | 0.14         | 0.02            | 0.02                    | 0.03                 | 0.01          | 0.09           | 0.02                | 0.24                            |
| Resilience    | 0.16         | -0.12           | -0.08                   | 0.05                 | -0.07         | 0.09           | 0.03                | 0.24                            |
| Goals         | 0.19         | 0.00            | -0.20                   | -0.04                | 0.15          | 0.09           | 0.12                | 0.10                            |
|               | <b>T1-T3</b> |                 |                         |                      |               |                |                     |                                 |
| Reflection    | 0.11         | 0.28            | 0.32                    | 0.07                 | <b>-0.36</b>  | -0.22          | 0.10                | -0.12                           |
| Transitions   | 0.12         | 0.09            | 0.30                    | 0.19                 | <b>-0.42</b>  | -0.09          | 0.28                | 0.03                            |
| River of Life | 0.23         | 0.13            | 0.05                    | <b>0.44</b>          | -0.20         | 0.08           | 0.24                | 0.20                            |
| Skills        | 0.16         | -0.13           | 0.22                    | 0.11                 | -0.24         | -0.02          | 0.28                | -0.08                           |
| Review        | -0.04        | 0.15            | 0.27                    | 0.24                 | <b>-0.36</b>  | -0.22          | 0.15                | -0.25                           |
| Personality   | -0.04        | -0.02           | 0.08                    | <b>0.48</b>          | -0.25         | 0.04           | 0.19                | -0.05                           |
| Drivers       | -0.13        | 0.03            | 0.14                    | 0.12                 | -0.27         | -0.13          | 0.06                | -0.23                           |
| Relationships | 0.14         | 0.08            | <b>0.38</b>             | 0.17                 | <b>-0.40</b>  | -0.10          | 0.18                | -0.15                           |
| Optimism      | 0.12         | 0.25            | 0.21                    | 0.31                 | <b>-0.40</b>  | -0.10          | 0.18                | -0.01                           |
| Resilience    | 0.20         | -0.09           | 0.22                    | 0.28                 | <b>-0.40</b>  | 0.02           | 0.26                | -0.02                           |
| Goals         | 0.10         | 0.32            | 0.08                    | 0.29                 | -0.28         | -0.03          | 0.09                | -0.01                           |
|               | <b>T1-T4</b> |                 |                         |                      |               |                |                     |                                 |
| Reflection    | 0.06         | -0.01           | 0.07                    | -0.10                | -0.03         | 0.04           | <b>0.33</b>         | -0.03                           |
| Transitions   | 0.23         | 0.13            | 0.21                    | -0.26                | -0.10         | -0.01          | <b>0.34</b>         | 0.09                            |
| River of Life | 0.27         | -0.07           | 0.23                    | -0.11                | 0.03          | 0.02           | <b>0.39</b>         | 0.18                            |
| Skills        | 0.29         | 0.00            | 0.22                    | -0.15                | 0.09          | -0.01          | <b>0.31</b>         | 0.09                            |
| Review        | 0.23         | 0.11            | 0.24                    | <b>-0.30</b>         | -0.18         | -0.08          | 0.20                | 0.06                            |
| Personality   | 0.22         | -0.09           | 0.17                    | -0.13                | 0.07          | -0.06          | 0.21                | 0.08                            |
| Drivers       | 0.28         | 0.01            | 0.14                    | -0.19                | 0.12          | -0.23          | 0.21                | 0.11                            |
| Relationships | 0.09         | 0.21            | 0.31                    | -0.10                | -0.17         | 0.08           | 0.16                | -0.11                           |
| Optimism      | <b>0.33</b>  | 0.25            | <b>0.40</b>             | -0.32                | -0.20         | -0.09          | 0.18                | 0.18                            |
| Resilience    | 0.23         | 0.12            | <b>0.37</b>             | -0.26                | -0.19         | -0.07          | 0.28                | 0.12                            |
| Goals         | <b>0.35</b>  | 0.13            | <b>0.30</b>             | -0.07                | -0.03         | -0.06          | 0.25                | 0.23                            |





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**The Calouste Gulbenkian Foundation is an international charitable foundation with cultural, educational, social and scientific interests. Based in Lisbon with branches in London and Paris, the Foundation is in a privileged position to support national and transnational work tackling contemporary issues. The purpose of the UK Branch, based in London, is to bring about long-term improvements in wellbeing particularly for the most vulnerable, by creating connections across boundaries (national borders, communities, disciplines and sectors) which deliver social, cultural and environmental value.**

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**The Centre for Ageing Better is an independent charitable foundation, bringing about change for people in later life today and for future generations. It draws on practical solutions, research about what works best and people's own insight to help make this change. Ageing Better shares this information and supports others to act on it, as well as trying out new approaches to improving later lives.**

**The Centre for Ageing Better received £50 million of National lottery funding from the Big Lottery Fund in January 2015 in the form of an endowment to enable it to identify what works in the ageing sector by bridging the gap between research, evidence and practice.**