



EVALUATION OF TRANSITIONS IN LATER LIFE PILOT PROJECTS

EXECUTIVE SUMMARY



**The full report on the
evaluation of the
Transitions in Later
Life pilot projects**

Evaluation of Transitions in Later Life Pilot Projects: Executive Summary

Published in 2017 by

Calouste Gulbenkian Foundation

UK Branch

www.gulbenkian.pt/uk-branch

and

Centre for Ageing Better

www.ageing-better.org.uk

EVALUATION OF TRANSITIONS IN LATER LIFE PILOT PROJECTS

EXECUTIVE SUMMARY

This is an evaluation of seven pilot projects funded under the Calouste Gulbenkian Foundation's (CGF) (UK Branch) Transitions in Later Life programme. The Transitions in Later Life programme is based on the premise that transitions, such as retirement, provide an important opportunity to engage people in support and ensure people have positive experiences in later life.

This evaluation was co-commissioned by the CGF UK Branch and the Centre for Ageing Better (AB) as part of a partnership between the two organisations to use evidence and innovation to explore ways to help people manage major life changes in later life.

The projects which were evaluated were:

- Age and Opportunity
- Beth Johnson Foundation, in partnership with Ageing Without Children
- The Centre for Policy on Ageing
- Manchester MIND
- NHS Cheshire and Wirral Partnership Foundation Trust
- Positive Ageing Associates
- Workers Educational Association (WEA)

All projects delivered group-based interventions aimed at building the resilience and emotional wellbeing of people aged 50+. The projects used a number of varying tools and approaches, including: planning/goal-setting, self-reflection, self-coaching, storytelling, relaxation techniques, mindfulness, meditation and cognitive behavioural therapy. As well as delivering courses, the project leads participated in a Learning Community which met quarterly to share challenges and learning.

The overarching purpose of the evaluation is to understand how promising these approaches were in supporting people with transitions they experience in later life, for instance retirement, and to inform the development of future service provision.

EVALUATION QUESTIONS

The evaluation was conducted by Brightpurpose and investigated the following questions:

- What have been the types of outcomes for participants?
- How have the interventions contributed to these outcomes?
- Who engaged with the projects and why?
- What worked well and what were the challenges, in terms of:
 - Recruitment
 - Sustaining engagement throughout the courses
 - Intervention design and delivery
- What has been the impact of the programme on the project delivery organisations?

“I’ve realised that it’s okay to take a few months after my retirement to give myself the chance to think about what I want to do and how I want to spend my time, a bit of time to get used to being retired.”

METHODOLOGY

1. Survey questionnaires administered at four points: before the course, immediately after the course, and 3, and 6-12 months afterwards. These questionnaires included bespoke questions and three validated tools.
2. Telephone interviews with 17 participants undertaken 6-12 months after course completion.
3. Analysis of transcripts of external interviews with 12 participants provided by one of the projects.
4. Two interviews with each project lead.

MAIN LIMITATIONS AND INTERPRETATION OF THE EVALUATION

This evaluation has considered the seven projects, and the types of outcomes they have created, as a group, and has not evaluated the specific outcomes from individual projects. Participant feedback was consistent across the qualitative interviews from different projects.

Not everyone responded to the surveys; hence, we cannot be sure this data is representative of all participants, and it was not possible to have a control group.

Participants were contacted 6-12 months after completing their courses and asked to participate in interviews. Hence, it is possible that those who volunteered to be interviewed were those who had a more memorable experience. Further evaluation should investigate whether experiences vary for different participants.

WHAT DIFFERENCE DID THE COURSES MAKE FOR PARTICIPANTS?

Qualitative interviews indicated a transformative change in attitude and outlook as a result of the courses, in terms of:

- Confidence and readiness for the future;
- Resourcefulness;
- Positive attitudes to ageing and the future;
- Social connections and reduced loneliness;
- Sense of purpose.

Survey data indicated positive but relatively modest changes for respondents in terms of **confidence in facing challenges and changes, wellbeing, social connectedness, and resilience**. The difference in scale may be due to either the self-selection of the participants for interview; the ability of validated scales to capture the outcomes described in the interviews; or other reasons.

Confidence and readiness for the future

People felt that having the time to reflect - to think about what they wanted from later life and how that could be achieved - left them feeling in greater control and more confident about their future. The courses often gave people permission to pause: to not commit right away to meeting other people's expectations about how they would spend their time in the future until they had taken time to work out what they wanted for themselves. Participants reported feeling more equipped to deal with change and face challenges head on. Survey data also showed an increase in the proportion of respondents feeling confident or really confident in facing future challenges and changes by the end of their participation in the course. Furthermore, this was largely sustained up to six months after the end of the courses.

“Our financial situation isn’t brilliant, but I’ve stopped focusing on what we don’t have and can’t do, and started focusing on what we do have and what we can do. I’m going to work part time for a bit longer, but I feel so much more positive about the future and we are really enjoying planning ahead now.”

Resourcefulness

Reflecting and taking stock of their strengths, skills and personal attributes gave participants a greater sense of self-worth and self-belief, particularly amongst those who had felt they had little to offer previously.

Positive attitudes to ageing and the future

Participants reported strongly positive changes in relation to their outlook and attitude to later life. They had tended to view later life negatively, but participation led to a more balanced understanding of what it means to age. Interviewees reported increased optimism, a new-found enthusiasm, and a desire to make the most of this stage of life.

Social connections and reduced loneliness

People reported a greater appreciation of the importance of their social relationships and the role they would play in their life going forward. For those approaching retirement, there was an acknowledgement that the workplace had provided a lot of their relationships, interaction and support, and that this would change once they retired. There was a recognition of the importance of being proactive, and making a concerted effort to keep in regular contact with friends and family, and spend more time with them.

Sense of purpose

People approaching retirement spoke about the sense of purpose and self-worth that working gave them and how their role in the workplace had largely shaped how they had seen themselves. They acknowledged that they had been anxious about the gap that retirement would leave in their lives. Going on the course helped to alleviate some of these concerns. People found that making plans and setting goals provided a sense of achievement and self-worth and added to a sense of purpose.

WHAT ASPECTS OF THE COURSES MADE THE DIFFERENCE

Interviews with participants identified the following six interdependent aspects of the courses to be most important in achieving their outcomes:

- **Space and time** – dedicated time where they could reflect on the changes, challenges, and opportunities ahead.
- **Facilitation** – to create the safe space, support the discussions and facilitate productive reflection.
- **Provocation** – scenarios, case studies and discussion points that encouraged participants to think about different situations and to think differently about them.
- **Reframing** – presenting later life as a life stage with positive opportunities, challenging stereotypes about ageing and encouraging participants to take control of their future.
- **Tools and techniques** – providing a range of practical tools and frameworks to enable reflection, thinking differently, decision-making and planning, for example, goal-setting tools, wheel of life, mindfulness.
- **Group process** – sharing experiences and hearing different perspectives from people in the ‘same boat’.

WHO PARTICIPATED AND WHY?

The most commonly stated reason for signing up for courses was to get help for preparing for retirement or to gain skills and information that would support the transition into retirement. Respondents reported hoping to gain a variety of immediate benefits from the course, in terms of:

- practical tools, strategies, and information
- insights and space to think
- a more positive and confident outlook

For the longer term, the most cited expectations were that courses would equip them with skills that would benefit them in the future, lead to increased confidence or bring about a more positive outlook and attitude related to later life.

“Hearing about what some of the other people on the course were doing gave me the kick I needed to look into different things that I could be doing.”

OPERATIONAL LESSONS LEARNED

The majority of projects reported that recruitment took more time and effort than they had originally anticipated. They perceived that this was related to bringing a new product to market which was further compounded by the following:

- the projects tackle the need to prepare emotionally and psychologically for the changes experienced in later life, which is not a need that is typically discussed in society;
- the life stage that the programme prepares people for is relatively abstract until people are experiencing it, and may yet be some time away. Feeling motivated to sign up for such an intervention may therefore not seem a priority

Building and using partnerships with employers to recruit was a successful approach, and projects felt this was because employees were referred recruited on to the course by someone known and trusted. Furthermore, where these projects have run more than once, word of mouth has become an important factor, with participants recommending the project to colleagues.

All projects began with a curriculum which had been designed in advance. However, course facilitators flexed the flow of sessions, giving more or less emphasis or time to each, based on feedback from participants and their own observations of individual or group responses to different components on the day. This appeared to work well – the flexibility was felt to be an important aspect of successful delivery.

WHAT DIFFERENCE DID THE PROGRAMME MAKE TO DELIVERY ORGANISATIONS?

Projects felt that developing new interventions under the Transitions in Later Life programme had benefitted them through learning in terms of:

- Testing a new approach in terms of the cohesive offer around transitions in later life, as well as different delivery formats
- Strengthening relationships and reputation
- Reaching a new set of clients, and increasing their ability to reach older age groups in the future
- Testing out the approach of building the capacity of others to deliver

Finally, in one instance, the delivery of the project was felt to have catalysed organisation change in relation to how the organisation supports older workers.

“I’m hoping that instead of feeling like I’m battling through life and that it is likely to only get worse, that I develop a more optimistic, confident attitude that enables me to recognise and take opportunities that enrich my life instead of letting difficulties increasingly limit it as I get older. I want to be exuberant, enthusiastic and engaging in my later years, not fearful, reticent and retiring!”

ABOUT THE CALOUSTE GULBENKIAN FOUNDATION

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.

ABOUT THE CENTRE FOR AGEING BETTER

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.

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