EVALUATION OF TRANSITIONS IN LATER LIFE PILOT PROJECTS

EXECUTIVE SUMMARY
AND
FULL REPORT

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!"

EVALUATION OF TRANSITIONS IN LATER LIFE PILOT PROJECTS

FULL REPORT

CONTENTS

1

INTRODUCTION

This evaluation reports on the outcomes achieved by seven pilot projects, and how these outcomes were achieved. The projects ran between March 2016 and May 2017 and were funded under the Calouste Gulbenkian Foundation's (UK Branch) Transitions in Later Life programme.

The evaluation was co-commissioned by the Calouste Gulbenkian Foundation (CGF) 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 purpose of the evaluation is to understand promising approaches to supporting transitions in later life, for instance retirement, and to inform the development of future service provision.

THE PROGRAMME

The Transitions in Later Life programme is based on the premise that transitions, such as retirement, provide an important touch point at which one can intervene and ensure people have more positive experiences in later life. The focus of this work to date has been on understanding retirement, a widely experienced transition that is often underplayed but can be challenging for many people. Whilst the focus of the work has been on retirement as a key life transition, some participants of the programme were not at this transition point.

Scoping research identified that resilience is strongly related to how we manage change, and that therapeutic techniques have the potential to help people to prepare for transitions and challenges in later life. Although the projects approached the subject in different ways, all projects delivered group-based interventions aimed at building the resilience and emotional wellbeing of people aged 50+. The tools and approaches utilised by each of the projects included a combination of:

- planning/goal setting
- self-reflection
- self-coaching
- story-telling
- relaxation techniques
- mindfulness
- meditation
- cognitive behavioural therapy

**This evaluation was conducted by brightpurpose, who are also the authors of this report.
Learn more about its work at www.brightpurpose.co.uk**

THE PROJECTS

A short description of each project is provided in summary below and in full in Appendix 1.

Age and Opportunity

This project delivered courses in three different settings and target groups. Two courses were delivered over six half-day sessions. One with a group of male prisoners in a low security prison, and another to retired community residents in a semi-rural setting. The third, for staff of a large employer for those approaching retirement, was delivered over three full days. The courses all provided a blend of theory and practical tools and skills, aimed at helping people to understand and develop resilience and equip them for future changes and challenges.

Beth Johnson Foundation, in partnership with Ageing Without Children

This project delivered the course over a single day: all but one of the courses were delivered to people aged 50+ (pre and post-retirement) and recruited through local voluntary sector organisations. One other session was delivered to employees of a local authority who were approaching retirement. The course focussed on equipping participants to prepare and plan for later life and provided tools and techniques to accept and adjust to future changes and challenges.

Centre for Policy on Ageing (CPA)

This project was delivered over three sessions: two half days and one full day. It was delivered in partnership with a large-scale employer, to staff approaching retirement and their partners. In addition to delivery by CPA, staff from a third sector organisation were trained to deliver the course to one cohort in the community. The course used story-telling to explore different experiences of later life and to help participants explore how they wanted their own later lives to be. This was combined with mindfulness and reflective practices, and goal setting.

Manchester MIND

This project was delivered over six weekly sessions, the first four sessions lasting two hours and the final two over two and a half hours. The course was originally targeted at those who were approaching retirement or recently retired, but latterly engaged with people that had retired but were experiencing other transitions. Positive psychology, cognitive behavioural therapy (CBT), mindfulness and relaxation/meditation were key components of the course, combined with planning and goal setting for the future.

NHS Cheshire and Wirral Partnership Foundation Trust

This project was a two-day course run over consecutive days, for employees of the Trust who were approaching retirement age. The course explored the factors that support mental and emotional resilience, and introduced techniques including positive thinking, visualisation, goal setting and mindfulness. Participants also developed action plans for preparing themselves for this next phase of life.

Positive Ageing Associates

This project was delivered in several different formats: weekly half-day or evening sessions over six and eight-week periods, two full consecutive days and weekly webinars over a four-week period. Participants included those approaching retirement as well as people who had already retired. The course provided techniques and learning drawn from Positive Ageing Theory, Positive Psychology, Mindfulness and CBT.

Workers Educational Association (WEA)

This project was delivered over the equivalent of three full days, but in different formats for different groups: one day per month for three months for self-employed women approaching retirement age, and one evening per week for six weeks for employees approaching retirement from local large employers. The course introduced reflective writing, mindfulness and mind-mapping alongside relaxation and movement techniques.

AIMS OF THE EVALUATION

The evaluation was conducted to answer the following questions:

1. What have been the outcomes for participants? (Section 2)

2. How have the interventions contributed to these outcomes? (Section 3)

3. Who engaged with the projects and why? (Section 4)

4. What worked well and what were the challenges, in terms of: (Section 5)

   a) recruitment

   b) sustaining engagement throughout the courses

   c) intervention design and delivery

5. What has been the impact of the programme on the project delivery organisations? (Section 6)

EVALUATION METHODOLOGY

The core components of the evaluation methodology
were as follows:

Data source	Methods used	When
Participants	**Quantitative** Survey questionnaires incorporating three validated questionnaires: ● Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS) ● The Resilience Centre's 14-item Resilience Scale ● The Campaign to End Loneliness measurement tool In addition, the surveys also included bespoke questions that were developed to explore: ● participants' levels of confidence in relation to coping with challenges and change in the future ● participants' confidence in maintaining existing relationships and/or developing new relationships that would meet their needs **Qualitative** Semi-structured telephone interviews with 17 participants, lasting 30-45 minutes each Analysis of transcripts of external interviews with 12 participants, provided by one of the projects	● Before course participation (Pre) ● Immediately after course completion (Post) ● Three months after course completion (3m) ● Around six months after course completion (6m) 6-12 months after course completion 6-12 months after course completion
Project delivery staff	Semi-structured interviews lasting between one and two hours Semi-structured follow-up interviews lasting around twenty minutes	Towards the end of delivery After completion of delivery
Project applications and reports	Review of each project's: ● original funding application ● interim report ● final report	Original applications at the beginning of the evaluation Interim reports in advance of first semi-structured interview with project staff member Final reports in advance of final reporting

More detail is provided in Appendix 2.

LIMITATIONS AND INTERPRETATION OF THIS EVALUATION

This is an evaluation of seven projects that are closely related to each other in their aims and approaches, but which have a number of differences (see Section 1 and Appendix 1) in their offer to participants, as well as the target group, setting and length of the courses. Their core components can be defined as:

- group based intervention
- experienced facilitation
- facilitators with expertise in a range of tools and techniques to support resilience
- reflective person-centred focus

These projects are in relatively new territory in terms of the type of approach they are using, and outcomes they are seeking. As such, the primary purpose of this evaluation is to understand what types of outcomes these interventions may be able to achieve, and what appears to be driving this in terms of the projects' practice. Findings on outcomes relates to these courses 'as a group' rather than any individual course. The qualitative feedback is relatively consistent across all projects, particularly in terms of the elements of projects which those interviewed felt supported positive outcomes.

This is the first stage of a two-phase evaluation. The findings in this report, especially the qualitative data on outcomes, will help inform the design of the second evaluation.

There are several limitations to an evaluation of this kind:

Understanding what practices contributed to outcomes

The evaluation hoped to differentiate between the different approaches and related tools used by projects (e.g. mindfulness, storytelling, CBT, etc.) and assess whether any were more promising than others. There were a number of challenges associated with this:

- participants generally discussed the most useful and lasting aspects of the course in terms of process rather than content.
- the majority of projects rarely explicitly labelled the techniques they used, meaning it was difficult to trace back experiences to the specific approaches and tools.

Interpreting the quantitative data

- the nature of the recruitment may have meant that participants are not representative of the total population of people approaching (or having recently gone through) retirement. Additionally, we know that some participants were outside the expected age group, being younger, or having been retired for several years.

- not everyone responded to the entry, exit, and three- and six-month post surveys. We therefore cannot be sure that respondents are representative of the total participant population. This is further compounded by a fairly high attrition rate relating to the three-month post and six-month post participation surveys. This means that these results cannot be considered statistically significant.

- drop out from the projects was not captured or investigated.

- it was not possible to have a control group in this evaluation. The data describes positive outcomes for respondents, and the projects' contribution to these outcomes, but cannot provide causal evidence of impact.

- the validated tools used in the surveys were selected on the basis of an overall theory of change for the wider transitions in Later Life programme, as those best aligned with anticipated outcomes (and which, ideally, had been used previously for research with older adults). A common limitation of validated tools is that they do not necessarily comprehensively measure the changes achieved through a project. However, as the programme and evaluation were explorative, a broad measurement tool was appropriate, and the use of robust validated tools was deemed the best way to do this.

Interpreting the qualitative data

Participants volunteered to participate in the qualitative interviews when contacted 6-12 months after course completion. The qualitative findings may therefore not be representative of the whole population of participants. It is possible that those who had a memorable experience were more likely to be more interested in the opportunity to talk about this experience. Nonetheless, the qualitative findings were very consistent across all 17 participants interviewed, which indicates that although these may not be generalisable to the population, there may at least be a certain group or groups of people who gain the benefits outlined in this report.

2

WHAT DIFFERENCE DID THE COURSES MAKE FOR PARTICIPANTS?

Through analysis of the qualitative interviews, and supporting data from the surveys, we identified the following as the main outcomes experienced by participants:

- confidence and readiness for the future
- resourcefulness
- positive attitudes
- social connections and reduced loneliness
- sense of purpose

These will now be discussed in turn, in the following sections. Unless otherwise stated, survey data is presented visually, whilst the detailed narrative relates to the interview findings. The survey data presents different ratings at different time points as outlined in section 1.4. The survey data is presented for two different respondent cohorts:

- total respondent population – labelled in figure titles as '(a) all respondents'
- respondents that have completed all of the first three surveys - referred to in figure titles as '(b) respondents completing the first three surveys'

It is worth noting that, as discussed in section 1.4.1, there has been a fairly high attrition rate relating to completion of the three-month and six-month post-participation surveys. This means that the results presented for these time points cannot be considered statistically significant.

CONFIDENCE AND READINESS FOR THE FUTURE

Control and confidence

One of the most consistently reported changes amongst interviewees and survey respondents was increased confidence. Whilst the interview sample was relatively small (n=17), feedback was universal in relation to this. Participants explained that having the time to reflect and think about what they wanted, and how that could be achieved, left them feeling in greater control of their future, and that this feeling of control gave them greater confidence going forward.

Considering own wants and needs

In interviews, participants reported that the course they attended gave them permission to be a little bit 'selfish' and really focus on what it was they wanted. The majority of participants spoke about pressures and expectations from family, friends and the workplace, which influenced their thoughts about retirement and/or later life. Some realised there was a conflict between what they wanted and others' expectations. Several participants spoke about the course giving them permission to press the pause button and not commit to meeting others' expectations until they had taken time to work out what they wanted for themselves.

"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."

Everybody acknowledged that they had some big decisions to make, and that those big decisions were likely to impact on those around them, but that they were confident and felt equipped following to make those decisions, following their participation.

Awareness of options and opportunities

Several interviewees spoke about the course giving them an insight into the different options and opportunities open to them and/or reawakened the desire to do things they had always wanted to do but never got around to.

"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."

Participants spoke about now having the confidence and motivation to actually start trying new and different things; for example, a few had already started new hobbies, volunteering and/or social activities as a result of going on the course.
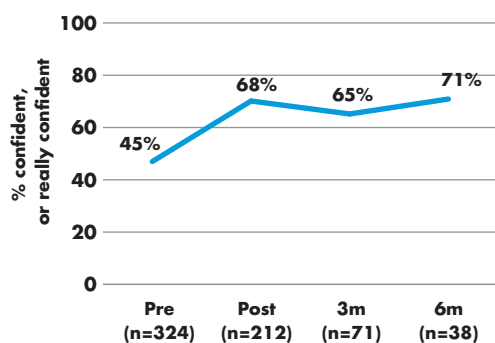
Dealing with challenges and changes

Another area where participants reported greater confidence was in their ability to recognise and manage future challenges and changes in their lives. They reported feeling more equipped to deal with change and face challenges head on, with several participants able to provide examples of having done so since finishing their course. One example related to a man whose son was leaving home to go to university elsewhere in the country. This participant reported that he had been dreading the day that his son would move out. However, having been on the course, he had largely stopped thinking about negative aspects of this change and was instead focusing on the positives for him and his son. He also started to plan for when his son did leave, giving thought to social and leisure activities that he could start, to minimise the time he would be in the house on his own.

The survey responses support this finding. Figure 1 shows a notable increase in the proportion of participants feeling confident or really confident in facing future challenges and changes by the end of their participation. Furthermore, this is largely sustained up to six months after their participation.

FIG. 1: Confidence in facing future challenges and changes over time for:[1]

(a) all respondents and

(b) respondents completing the first three surveys

---
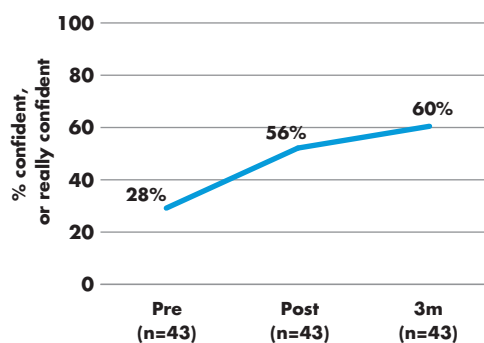
1. Rating-scale answers to the question: As we approach later life we can face challenges and times of change. How confident are you that you will be able to cope with changes in your life and deal with potentially challenging times ahead?

RESOURCEFULNESS

Participants reported that the course had helped them identify, recognise and rediscover their strengths, skills and attributes. For some, the value of this was in reaffirming what they already thought were their personal strengths and skills, but prior to participation had become tinged with self-doubt. For others, it helped them to recognise skills, strengths and/or personal attributes that they previously hadn't considered.

Participants reported that reflecting and taking stock of their strengths, skills and/or personal attributes had given them a greater sense of self-worth and self-belief, particularly amongst those that had felt they had little to offer previously. Some participants also reported that acknowledging their strengths and skills had influenced their future-oriented thinking, as well as giving them the belief that they could handle whatever life was going to throw at them.

Participants also spoke about the courses helping them to recognise and acknowledge the positive aspects of their lives more widely. These included their social networks, hobbies and activities they enjoyed. They said this helped them to shift towards having a greater appreciation of what they already had, and the part this could play in a fulfilling future.

POSITIVE ATTITUDES TO AGEING AND THE FUTURE

The majority of interviewees reported strongly positive changes in relation to their outlook and attitude to later life. Before the course, many said they tended to view later life in negative terms, but participating in the course led to a more balanced perspective. Participants accepted that there would be challenges and changes ahead, but they were also able to recognise, and take comfort from, the many possibilities and opportunities that they felt that this life stage would bring.

Interviewees described having a much more positive outlook, and remarked that they now see later life and post-retirement as an exciting new chapter in their lives. They reported increased optimism, a new-found enthusiasm, and a desire to make the most of this stage of life.

Several interviewees explained that it had brought about a new way of thinking about later life and, by changing the way they thought about it, it had changed the way they felt about it. Fear, apprehension, anxiousness and uncertainty were all words that they used to describe how they had previously felt about retirement/later life, feelings that they say they do not have anymore. Some participants talked about the course helping them to focus positively on the things they can control, rather than worrying about things they cannot control, and that this also brought more contentment.

"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."

It is important to note that these interviews were conducted six to twelve months after completion of their course, thus indicating that the experience had a lasting effective on attitudes and outlook for these participants.

SOCIAL CONNECTIONS AND REDUCED LONELINESS

Most interviewees spoke about having a greater appreciation of the importance of their social network and the role that it could play in their life. The course had prompted them to think more about what they wanted and needed from existing relationships, and the changes they wanted to make. For those approaching retirement, there was an acknowledgement that the workplace provided most of their relationships, social interaction and support network and that this would change by varying degrees post-retirement.

For some this has resulted in them taking steps to re-establish relationships with friends or family with whom they had lost touch. For others, the course has given them the confidence and motivation to start new activities which provide opportunities to meet new people and establish new relationships. Being more proactive, and making a concerted effort to keep in regular contact with friends and family, and spend more time with them, was another consistent theme. There were also some examples of new friendships between participants on the same course, which continued after the course had finished.

"I was really hoping to meet some like-minded people on the course, and I did. Now if I bump into them in town we have a coffee or stand and chat. And there was one person there that I just clicked with straight away. She's become a really good friend, and I'm so glad I met her on the course."

Most interviewees reported that they were now more confident that their relationships and social circle met their needs, and contributed to their positive outlook and their enjoyment of life. Several interviewees also spoke about the importance of being there to provide friendship and/or support to others as well.

A very small number of interviewees were not satisfied with their relationships and wanted to expand their social network. One interviewee reported that this was due to existing friends not really being there for them when they needed help or support and for two others, they simply felt that they needed a wider social network to meet their needs. They reported that the onus would be on them to reach out and do so.

The findings from the participant surveys also suggest that participants experienced positive changes in terms of reduced levels of loneliness. The Campaign to End Loneliness Measure was used as a proxy for measuring social connection and levels of loneliness, whereby a reduction in score over time indicates an improvement.

Figure 2 shows that the average levels of loneliness among all survey respondents has decreased by the end of their participation, and that this improvement is sustained six months after participation.

Figure 3 shows participants self-rated level of confidence in maintaining existing relationships and/or developing new ones. The proportion of respondents feeling confident or really confident increases over time both for all respondents and those completing all of the first three surveys. Whilst there is a slight drop at the three-month post-participation stage for all respondents, this increases again at the six-month post stage. Among participants who completed all three surveys, there was an increase at each of the survey points.

FIG. 2: Levels of loneliness over time for:[2]

(a) all respondents and **(b) respondents completing the first three surveys**

(scores from The Campaign to End Loneliness measurement tool range from 0 – least lonely, to 12 – most lonely)
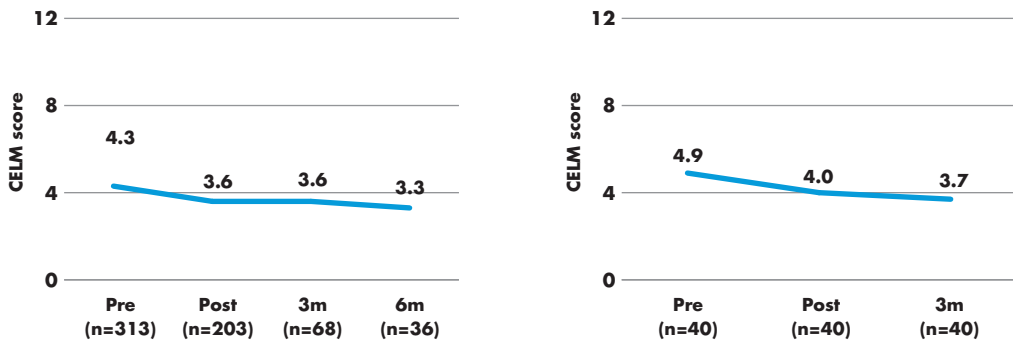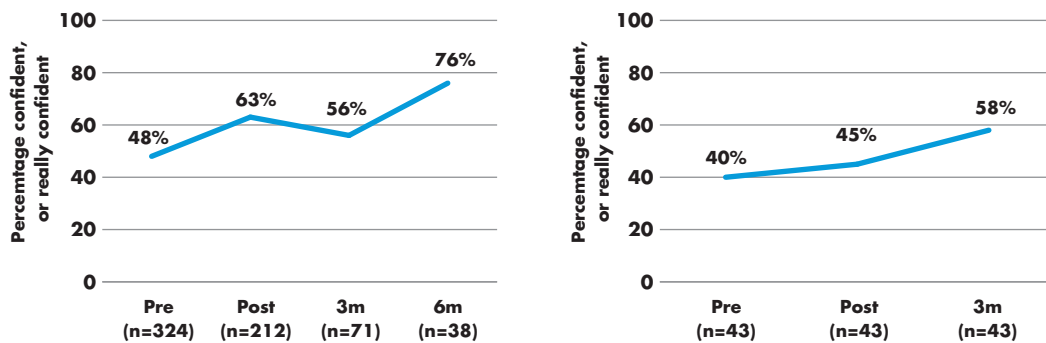

FIG. 3: Confidence in maintaining and/or developing new relationships over time for:[3]

(a) all respondents and **(b) respondents completing all three surveys**

---

2. Average across respondents' scores from The Campaign to End Loneliness measurement tool

3. Rating-scale answers to the question: As we approach later life we can find our relationships and friendships change. How confident are you that you will be able to maintain existing and/or develop new relationships and friendships that will satisfy your needs?

SENSE OF PURPOSE

Interviewees who were approaching retirement spoke about the sense of purpose and self-worth that working gave them, and of their role in the workplace influencing how they see themselves. The workplace provides the environment that lets them use their skills and strengths and make a valued contribution. Interviewees acknowledged that prior to the course they were anxious about the gap that retirement would leave in their lives. We also heard from those who were already retired but found themselves 'in a bit of a rut'. These people felt that they still had something to offer and things they wanted to do, but found that they lacked the motivation, confidence or knowledge to change the position they found themselves in.

Those approaching retirement reported that the chance to explore different ideas, options and potential opportunities helped to alleviate some of their concerns, helping them to see that the end of working life does not mean the end of doing something constructive, worthwhile and valued. As a result of the course, several people had already made plans for what they wanted to do following their retirement. Similarly, the courses re-enthused those interviewed who were already retired, giving them a greater sense of self-belief and a desire to make positive change. Making plans and setting goals has been an important element for those already retired. Having something to aim for and achieving goals provided a sense of achievement and self-worth. Furthermore, those who had set themselves goals to do new and different things were finding that this also added to the sense of purpose that they now had.

MENTAL WELLBEING

Figure 4 shows that there was a slight improvement in average levels of wellbeing over the duration of the course, and for those who completed the first three surveys. This is sustained beyond course participation, as shown by the fact that the score achieved on the WEMWBS scale immediately post participation in the course is sustained until the 6-month timepoint.

The findings from the survey suggest only a modest improvement in wellbeing. However, the qualitative interview feedback provides a richer insight into the changes that people have experienced and the reasons why these changes have happened. Areas such as confidence, optimism, positivity and relationships with others are aspects that are measured in the WEMWBS and are all areas where interviewees reported positive change and/or improvement. Furthermore, interviewees' feedback indicated that these improvements were more dramatic than appears to be indicated by the WEMWBS scores. It is not clear whether this is because the survey covered a wider range of components of wellbeing that participation did not influence any change in, or whether there were a wider range of experiences within the whole population than reported in the qualitative interviews.

FIG. 4. Levels of wellbeing over time for:

(a) all respondents and   **(b) respondents completing the first three surveys**
(scores from WEMWBS range from 14 – lowest level of wellbeing, to 70 – highest level of wellbeing)

---
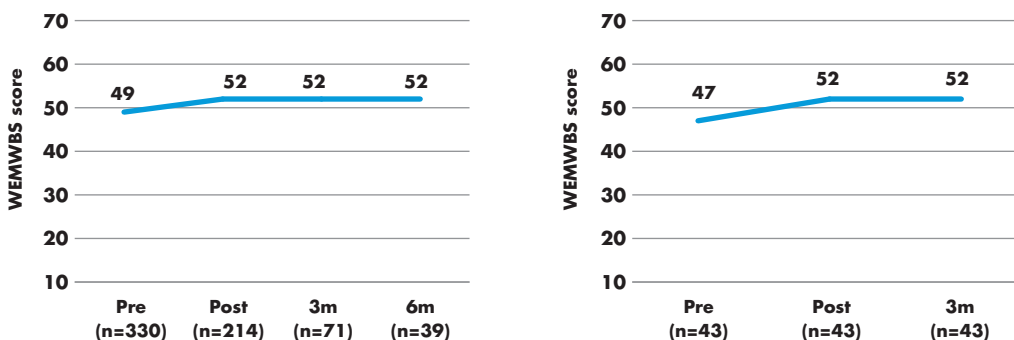
4.   Average across respondents' scores from the Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS) questionnaire.

RESILIENCE

Resilience is a broader term encapsulating many of the characteristics outlined above. We used a validated tool in the surveys to measure changes in this for participants – the 14-item Resilience Scale. The scale was developed by The Resilience Centre, who define resilience as 'the capacity each of us can develop that prepares us for life's ups and downs and promotes positive adaptation to any situation no matter how serious and stressful it might be'.

Figure 5 shows a moderate and sustained increase in resilience levels for respondents to the survey. It is also worth noting that scores at each of the survey points are within the 'high resilience' range (a score from 64 up to 81) as defined in the 14-item Resilience Scale. Respondents who completed the first three surveys follow a similar pattern, though the average pre-participation score for this sample was slightly lower than that of all respondents, whilst scores three months after participation were more or less the same.

Whilst the changes in resilience levels are fairly modest, and start from a relatively high base, it is striking that resilience levels continue to rise beyond the point that participation has ended. This aligns with the feedback gathered during interviews, with participants reporting that they have faced tough decisions, choices and/or changes, managed to navigate them and feel stronger and better equipped for having been through them.

In common with the WEMWBS results, the quantitative resilience findings tell a modestly positive story. However, the feedback from interviewees presents a more meaningful change in perceived resilience, and in the many components that contribute to resilience, such as confidence, managing difficult situations, self-belief, being interested in different things, and having a sense of purpose.

FIG. 5. Levels of resilience for:[5]

(a) all respondents and

(b) respondents completing the first three surveys

(scores from The 14-item Resilience Scale range from 14 – lowest level of resilience, 98 – highest level of resilience)

---
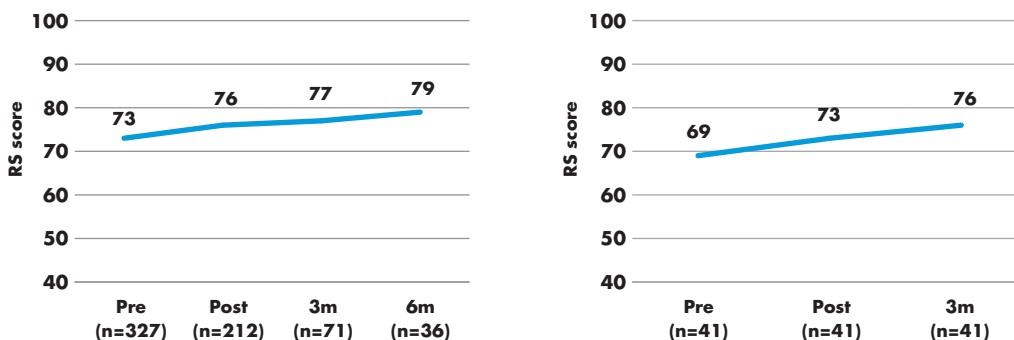
5.   Average across respondents' scores from the 14-item Resilience Scale questionnaire.

MAKING CHANGES

The post-course survey (immediately after participation) asked participants whether they planned to do anything differently as a result of their participation. The following chart provides a breakdown of the main themes respondents reported, and the proportion of participants who reported them. Overall, 87% of respondents reported at least one planned change.

At the third survey, three months after participation, respondents were asked if they had actually made any changes as a result of their participation. Eighty nine percent of all respondents to the three-month post participation survey reported making at least one positive change. This was also explored during interviews with participants. The changes that were reported covered four main themes, as set out in figure 7:

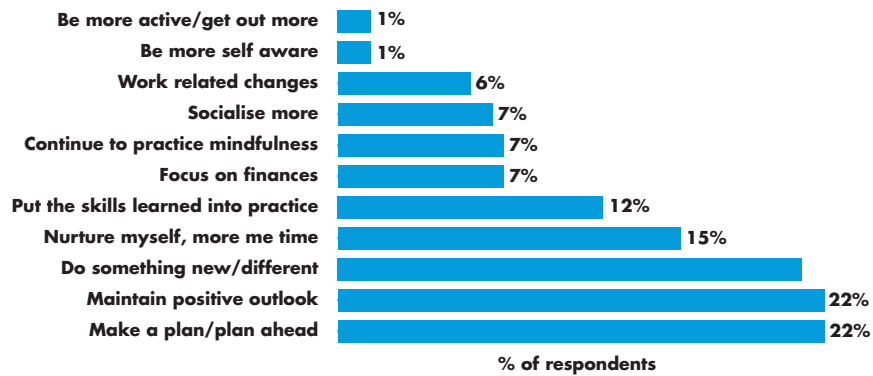**FIG. 6. Planned changes reported by participants[6]**
n=204 (providing 247 responses)

	% of respondents
Be more active/get out more	1%
Be more self aware	1%
Work related changes	6%
Socialise more	7%
Continue to practice mindfulness	7%
Focus on finances	7%
Put the skills learned into practice	12%
Nurture myself, more me time	15%
Do something new/different	
Maintain positive outlook	22%
Make a plan/plan ahead	22%

FIG. 7. Reported changes as a result of participating in the courses[7]
n=64 (providing 91 responses)

	% of respondents
Changes to social life/connections	20%
Changes to lifestyle	38%
Doing something new or different	41%
Changes to thinking and behaviour	44%

---
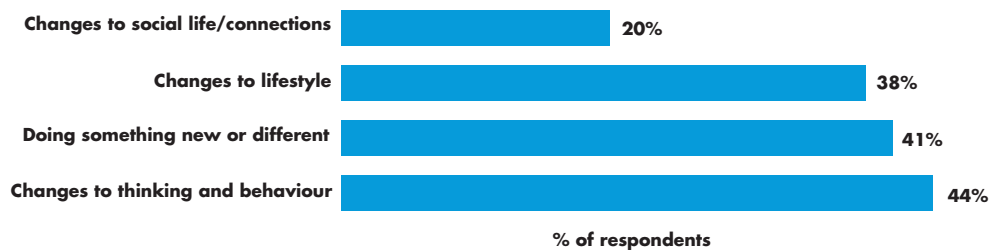
6. Free-text responses to the question: As a result of attending the course are you planning to do anything differently? If so, tell us a little about that.
7. Free-text responses to the question: What changes, if any, have you made in your life to prepare for times ahead since completing the programme/workshop/event?

3

WHAT ASPECTS OF THE COURSES MADE THE DIFFERENCE?

Our qualitative interviews with participants examined both the course outcomes and the characteristics of the courses that led to those outcomes. We explored with participants their perceptions of the impact of different components of the course and the ways in which it was delivered, and found that six aspects of delivery were felt to be essential in contributing to the outcomes described by participants. These are summarised below, and discussed in more detail in the following sections:

- space and time
- facilitation
- provocation
- reframing later life
- group process and peer support
- tools and techniques

It is important to note that all of these are interdependent – each component is supported by the other five. For example, simply having a couple of days off from work, to focus on later life and the future, might provide space and time, but it would not be effective by itself. Participants told us they also needed a structure, tools and the support of others (facilitators and peers) to be able to focus productively on the transitions ahead. The interviews were less successful in understanding participants' perceptions of which tools or techniques of the courses had been most helpful (e.g. mindfulness, CBT, self-coaching). Participants interviewed did not name specific elements, potentially because they were not introduced or labelled as such in the courses.

SPACE AND TIME

Interviewees reported that the course gave them space and time to think about the next stage in their lives and how they would approach it. They stated that they would not have made that time for themselves otherwise. Furthermore, 29% of post-participation survey respondents reported that having the opportunity and time to think and reflect was the most valuable aspect of the course. This is in contrast to pre-course surveys where it was relatively low on the list of reasons for participation.

"It's not something I had given a great deal of thought to. Not because I was putting off thinking about it, you just find yourself giving all your time and energy to the things going on in your life now. Just having that time, and forcing yourself to think further ahead has been so useful and has made me feel more prepared."

In some cases, interviewees admitted they had been avoiding thinking about retirement and this next phase of their lives. The course provided a safe space - described by participants as somewhere they felt comfortable being open and honest without fear of being judged in an environment of mutual trust and respect - to face up to the changes and challenges ahead, as well as decisions they had to make about the future.

"We'd both been ignoring it and hoping it would go away. It was just too hard to think about. After the course, I went home and talked to my husband about it, and now we've faced up to it. We've got a plan, and I feel much less worried. It's so much better than not knowing."

Others said they knew they needed to think about it and plan for it, but struggled to carve out time in their busy lives. Furthermore, they did not find it easy to focus on the subject with so many immediate calls upon their time and attention.

Participants also valued the opportunity to reflect on the past. This was an important element which enabled participants to think about past challenges and transitions, how they had navigated them, and how they could draw on these experiences to help them navigate future challenges and transitions.

"I valued the chance to think about and discuss with others in the group some of the tough times I've been through in the past, and how I got through them. It was reassuring and gave me confidence that if I've done it before I can do it again."

FACILITATION

The importance of effective facilitation was highlighted both by participants and by project staff. Participants reported that the project facilitators had had a highly positive influence on their overall experience and played the following essential roles:

- rapidly establishing trust and openness among the group

- encouraging participants to share experiences, by sharing their own experiences with the group

- ensuring all members of the group had the opportunity to participate

- managing occasionally difficult group members

- introducing a variety of tools and techniques in response to participant discussion and feedback

- making the sessions feel exploratory and a shared journey rather than a 'talk and chalk' course

"They (the facilitators) were excellent, sensitive when they needed to be, respectful of the group and you could tell they were interested in you and what you had to say. They managed the space really well, gave everyone the chance to speak and brought out insights. They made the course what it was."

Furthermore, the project leads reported needing to have advanced facilitation skills to be able to deliver their courses. They stated that, although there was a planned curriculum, they needed to flex and adapt that curriculum depending on participants' responses to different tools, techniques, approaches and activities. Examples of this included flexing the time allocated to different topic areas, introducing new topics, and re-ordering content. Consequently, in addition to strong facilitation skills, they needed deep expertise of the subject matter covered during the course (both resilience itself and the concepts introduced such as mindfulness, goal-setting, etc.) alongside relevant tools and techniques, to allow them to dip into their tool bag for alternatives as required. In most projects, the delivery staff were already skilled and experienced in delivery of these techniques. However, in one project this was not the case for all staff, and the project lead highlighted the challenge of making sure staff acquire the necessary skills, especially in therapeutic techniques, so that the course can be delivered safely and effectively.

PROVOCATION

Those participants who reported the importance of having space and time to think also stated that the course encouraged them to think differently. For example, this was done through facilitators posing scenarios and real-life stories, which participants then discussed so as to identify how they would respond in the same situation. The scenarios and stories themselves provoked participants to consider issues they would not have done otherwise.

Talking through scenarios

Examples of scenarios that participants had the opportunity to discuss and reflect on included:

- how to deal with family expectations of what they might do in their retirement, such as providing childcare for grandchildren or visiting relatives more often
- whether they wanted to continue working, or even pursue a different kind of work
- how they might grow and nurture their social life after retirement
- how they could use their skills and experiences in different ways after retirement
- what they still dreamed of doing and how they could make that happen

"It made me consider so many things that I was putting off thinking about, or just didn't know what I was going to do about certain things. It gave me the chance to work through some of the things that were bothering me."

Furthermore, provocation also came from sharing experiences and hearing fellow participants' ideas and perspectives. Participants reported that this caused them to reflect deeply about themselves, their responses to situations, and the assumptions that underpinned them, and to see that there were different ways of looking at and tackling situations.

"I got a lot from the others on the course. Some of them were so inspiring, what they had been through, how they had coped and got through it, it really made me think about how I can deal with things in the future."

Whatever the point under discussion, participants reported that this provocation to think hard about issues led to them thinking and feeling differently about what they wanted to do, and how much control they had over what they did in later life.

REFRAMING LATER LIFE

Across all projects, staff reported people engaging positively with activities and discussions which challenged stereotypes around ageing and which framed ageing in a positive light, focusing on the opportunities it presents.

Feedback from participants reinforces the view of delivery staff. Participants reported that the course had been very effective at reframing later life, helping them to see the positives and opportunities rather than having more negative connotations. Some participants reported finding the word 'retirement' negative, as it implied an end to the productive phase of their lives and suggested that they would no longer make a valuable contribution. Many interviewees described gaining much of their daily structure, social life and sense of self from their work, and that they had felt anxious about what their lives would be like after they finished work. Some were also concerned about possible financial challenges post-retirement, which created a further negative perception about what later life might be like for them.

"The thought of retirement terrified me. I've given so much to my work, it's been such a big part of my life and such a big part of who I am, my worth and my friends. The course has made me feel different about my retirement and what I can do once I've retired to have that sense of self-worth and making a contribution. I'm much more positive about it and have clarity."

Participants reported that the course encouraged them to think positively about the future, and about the things they could do rather than those they couldn't do. The course stimulated them to think about taking control of 'designing' their later life, and gave them tools, techniques, and support to do so. Participants reported that the course did not shy away from the challenges they may face in later life, but equipped them to maintain a positive attitude and to focus on changing what they could change rather than worrying about things they could not. This was a big shift for many interviewees, who reported a tendency to worry about and feel at the mercy of uncertainties.

"I was feeling negative and scared about life after retirement but now I'm actually quite excited about. I know it's not going to be perfect and there will be tough times, but I see so many opportunities as well."

For some participants, this reframing of later life was also about presenting new options for how to remain active and purposeful in their later years. They said the course opened up new thinking for them about entrepreneurship in general, social entrepreneurship in particular, freelancing and part-time working. Most had considered volunteering and hobbies, but had not really thought about other activities that they more closely associated with a working life. Finally, for a small number, this reframing of later life led them to decide to stay in their current role for longer. In some cases, they hadn't realised that this was possible, thinking they would have to retire once they reached a certain length of service or age, until they came on the course.

GROUP PROCESS AND PEER SUPPORT

Participants reported that being part of a group was very valuable and a crucial part of them gaining so much from the course. Much of the activity within the sessions involved group discussion, whether that was as a whole group or in smaller groups and pairs, and participants found this beneficial for the following reasons:

- sharing experiences with people who were in 'the same boat' felt positive and affirmed that they were not the only one facing these transitions

- hearing other people's perspectives on an issue challenged their assumptions and caused them to consider the issue from other angles, and sometimes to see it differently

- hearing others' experiences prompted new ideas for how they might tackle a similar issue in future

- small group discussion enabled people to explore an issue in-depth with others, enabling them to get to grips with it more than they sometimes could in a larger group

- being exposed to new ideas and opportunities broadened participant thinking in relation to how they would spend their time post-retirement

"The group gelled really quickly and everyone seemed open and willing to share. I took so much from others in the group, learnt so much from their experiences and ideas."

Feedback from project leads and participants suggests that creation of a safe space, where people could share ideas, experiences and perspectives openly, was an essential precursor to achieving these peer support benefits. The role of the facilitator was key to this. The facilitators set ground rules at the outset, which helped to create the conditions for safe interaction and open discussion, and they described working hard to monitor and facilitate a constructive group process.

Staff described a high level of trust and openness between participants, especially when they were working in pairs and small groups. This, perhaps understandably, appeared to increase over time. Where projects were delivered in a more compressed timeframe, staff questioned whether peer relationships had sufficient time to develop to their full potential. Their perception was that connection cannot be rushed, and when a project ran over fewer sessions or in an intense burst, there was less space for those connections to grow.

TOOLS AND TECHNIQUES

Participants reported that the course gave them useful tools and strategies to help them think differently about situations and to adopt a more positive approach. They also reported that tools to help with planning and decision making were very helpful. They reported that it was very important to have frameworks to help with their thinking, as they may otherwise have ruminated without focus or not known where to begin. Frameworks and tools gave them a scaffolding to build their thoughts around, and felt more concrete and purposeful than simply thinking 'freestyle'.

"I think part of my anxiety about retiring was not knowing what it held for me, what I wanted to do or even what I would be able to do. Having the time to think about what would make the next stage of my life good for me, and actually planning for achieving that has really helped me."

A goal of this evaluation was to determine whether some tools and techniques were more acceptable than others and whether some were more effective than others. There were a number of challenges with exploring this.

Firstly, participants described the most useful and lasting aspects of the course in terms of process – i.e. the principles described above. Secondly, the majority of projects, during delivery, didn't explicitly label most of the techniques they used, so when interviewees did highlight content it tended to be in quite loose terms.

"One of the best sessions was on perceptions of self and identity and how this can influence you. It's helped me to rethink the way I see myself and how others see me. Another useful session was around managing negative thoughts and how to enhance your mood when you're not feeling that great — it's something I've used since being on the course."

Observations from project staff suggest that participants' reactions to the different topics, tools and strategies varied, with participants engaging and responding to different aspects to varying degrees. For example, some appeared to embrace meditation and relaxation techniques, while others were more sceptical about them. Project staff reported that having a blend of different activities, tools and techniques ensured that everyone got something positive from each session, even if they didn't embrace every single aspect. That said, the content that participants most commonly highlighted as most valuable and beneficial related to planning and goal-setting tools and decision-making strategies and approaches.

One project did label the techniques used, and also provided a workbook which contained all the techniques. In this case participants were more likely to be able to name specific techniques they had used and found valuable. They also reported going back to the workbook since the course and trying out techniques again, including those that had not particularly resonated with them during the course.

4

WHO PARTICIPATED AND WHY?

We provide a full demographic breakdown of respondents at Appendix 3, but in summary:

- the majority of participants were in their late 50s or early 60s

- 75% were female and 25% male

- 62% were either employed or self-employed, 28% were already retired, the remaining 10% were a mix of unemployed, unable to work or 'other'

- 62% were living with a partner, 38% were not

- 95% described their ethnicity as white

Across the same demographic categories at a national level (England and Wales), data gathered from the Office for National statistics datasets show:

- of the population in the age range 55-64, 51% are female and 49% male[8]

- of the population in the age range 50-64, 69% are either employed or self employed[9]

- of the population in the age range 55-64, 73% were living with a partner, 27% were not[10]

- of the population in the age range 55-64, 93% described their ethnicity as white[11]

PARTICIPANTS' MOTIVATIONS AND ASPIRATIONS

In the baseline evaluation questionnaire, we asked participants about their reasons for signing up for the course, and what they hoped to gain both in the immediate and longer term.

The most commonly stated reason for signing up for courses was to help to prepare for retirement or to gain skills and information that would support the transition into retirement. The most common responses are shown below, and were reinforced by qualitative interview feedback responses (Fig. 8):

FIG. 8. Reasons for participation[12]
n=333 (providing 378 responses)

Reason	%
To learn mindfulness/relaxation	2%
To help with life circumstances	3%
Work-related reasons	3%
To meet people/share experiences	5%
To be equipped to help others facing transitions in later life	5%
To improve resilience and mental wellbeing	7%
To age positively	8%
Recommended / asked by manager	10%
Interested in topic	14%
Looking for practical skills and info re transition to retirement	25%
Part of preparation for retirement	34%

% of responses

---

8. https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/lifeexpectancies/adhocs /006398populationestimatesanddeathsbysingleyearofageforenglandandwalesandtheuk1961to2015

9. https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/adhocs /004933employmentstatusbyage2001to2015

10. https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets /populationestimatesbymaritalstatusandlivingarrangements

11. https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/ethnicity/adhocs/ 005378ct05702011censussexbyagebyimd2004byethnicgroup

12. Free-text responses to the question: Please tell us why you signed up for this course?

Respondents reported hoping to gain a variety of **immediate benefits** from the course, which fell into three broad categories:[13]

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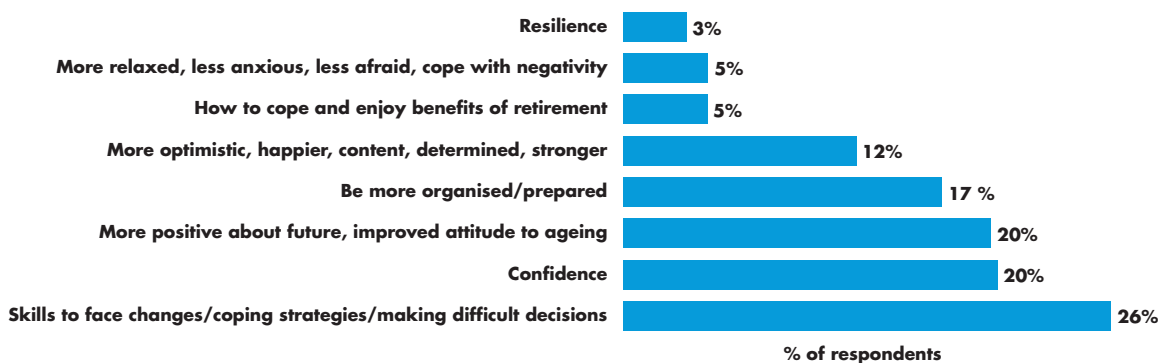- a more positive and confident outlook

We also asked how they hoped the course would benefit them in the **longer term**, as they face their later years. Figure 9 below shows that most respondents expected that their participation would equip them with skills that would benefit them going forward, lead to increased confidence or bring about a more positive outlook and attitude.

As one respondent put it:

"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!"

FIG. 9. Anticipated longer term benefits[14]
n=266 (providing 285 responses)

	% of respondents
Resilience	3%
More relaxed, less anxious, less afraid, cope with negativity	5%
How to cope and enjoy benefits of retirement	5%
More optimistic, happier, content, determined, stronger	12%
Be more organised/prepared	17 %
More positive about future, improved attitude to ageing	20%
Confidence	20%
Skills to face changes/coping strategies/making difficult decisions	26%

% of respondents

---

13. The question was answered by 295 respondents, who between them gave 376 responses
14. Free-text responses to the question: What difference do you hope this course will make to the way you face your later years in life?
15. Windle, G. et al (2011) A methodological review of resilience measurement scales. *Health Qual Life Outcomes*. 9

5
OPERATIONAL LESSONS LEARNED

RECRUITMENT AND ENGAGEMENT

Projects recruited participants via a variety of different routes and methods:

- as an employer – one project was run entirely by a public sector employer who recruited their employees directly onto the course

- employer partnerships – recruiting through one or more local employers, either as a referring partner or a delivery partner

- other partnerships – working with local organisations, community groups and service providers to recruit through their local networks

- advertising – using a range of media including posters, flyers and local press articles

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 projects prepare people for is relatively abstract until they are experiencing it, and may yet be some time away; feeling motivated to sign up for such an intervention may not seem a priority

Employer partnerships

Partnerships with employers took one of two forms, either working with an employer as a delivery partner, offering the intervention to staff 'in-house', or where the employer would refer staff in to a project being delivered locally. Both these approaches were successful, and projects felt this was because employees were referred or recruited 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. Projects report that a successful partnership requires close working between the employer and the project, and a strong level of understanding and buy in to the concept.

Some projects found that they had to build relationships with multiple employers to find one who bought in to the concept and could devote the resources to promote the project. Even where these factors are in place, the operational context of the organisation can prevent a partnership progressing.

Other partnerships

Projects also developed partnerships with other local organisations that have good local community knowledge and/or existing networks with the target audience. Close partnership working, frequent communication and strong buy-in were also seen as the key success factors for these partnerships. So too were the partner organisation's presence in and links with the local community important as an enabler to reaching and engaging the target audience.

However, this approach to recruitment has had mixed success in term of attracting sufficient numbers of participants in a reasonable time frame. Where it hasn't worked so well, projects felt this was because the partner agencies were unable to resource the recruitment activity sufficiently or didn't necessarily understand the offering well enough to promote it.

INTERVENTION DESIGN AND DELIVERY

Approaches to design

All projects drew on past experience of delivering similar subject matter, in terms of wellbeing and resilience, sometimes with other target groups, to inform the design of their intervention. This combined with reference to the evidence base of the types of interventions that could support their learning objectives.

A small number of projects also included an element of co-production in their design process, drawing on the knowledge and experience of people with lived experience to test the design. Projects reported that this process provided valuable insight into what the target client group needed and wanted. Whilst it required an additional investment of time, projects reported that the advantages of doing this made it worth it.

Content

All projects designed their course content to offer a combination of:

- tools, approaches and techniques to help participants cope and thrive in the future

- space and time for participants to reflect on their current and future life stages – e.g. feelings towards the future, hopes, goals, concerns and plans

All projects began with a curriculum which had been designed in advance. However, project leads report that they adapted the content of courses in response to the needs of the group, albeit always staying within the parameters of the planned learning outcomes. Course facilitators flexed the combination of topics and activities, 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. In some cases this was as simple as rearranging the order of the content to respond in the moment, and giving more time to an issue that emerged from group discussion sessions. This appeared to work well as flexibility was felt to be an important aspect of successful delivery.

The blend and range of content was spoken about positively by interviewees, who reported that the content was relevant to where they were at in life and what they hoped to gain from participation. They also reported that the variety of topics, tools and techniques covered kept things interesting. The findings suggest that Phase 2 of delivery should build on the tools used in Phase 1, which appear to have been well-received.

Appendix 1 provides a project-by-project breakdown which details the different formats used as well as the key content that was delivered.

Learning input

The tools, techniques and strategies were introduced with short presentations and demonstrations, and then participants had opportunities to try them out in a supported environment.

The activities geared towards reflection, self-awareness and building a personal sense of resourcefulness were initiated with case studies/real life stories, scenarios and focal questions, discussed in small groups, triads and pairs. The key themes from these smaller group discussions were then shared as a whole group during facilitated plenary feedback. Participants reported that the blend of input from facilitators and interaction with other participants was well balanced.

Project leads reported that many participants seemed to need a little time to feel comfortable opening up and discussing experiences and opinions, though once acclimatised to the facilitative and reflective style the majority responded extremely positively and fed back to facilitators that it was a style they found helpful and enjoyable. Qualitative interviews confirmed this, with interviewees explaining the style was very different to their past experience of courses, but that it enabled them to consider the issues deeply and apply the learning to their lives.

Delivery formats

One project trialled a webinar format of delivery but all other courses were delivered as face-to-face group workshops. The group process was perceived by projects to be a valuable aspect as it enabled participants to share experiences and ideas, and to learn from one another. A live chat function was used during the webinar delivery as means of enabling interaction between participants.

The number of sessions ranged across projects from one to eight, as did the duration and timings of sessions. The consensus among delivery staff is that the ideal is to have two or more sessions with breaks between sessions to allow participants to reflect on and digest learning. Our qualitative interviews with participants indicate all approaches were equally acceptable with no-one reporting any issues with sessions timing, duration or frequency. All reported that the pace of session was managed well and ensured that everything was covered in adequate depth and provided enough time for the different activities. Furthermore, of the completed post participation surveys, 96% of respondents stated that the course was delivered in the right way for them.

6

WHAT DIFFERENCE DID THE PROGRAMME MAKE TO DELIVERY ORGANISATIONS?

TESTING A NEW APPROACH

For most projects, this was the first time they had brought the different components and content together as a cohesive offering, and the programme provided the opportunity to test and refine it. This has resulted in some service provider organisations exploring the potential for this model of support to become part of their client offering. For one project in particular, the opportunity to try different formats of delivery as well as session numbers and durations, has provided them with added insight and understanding. This mainly related to how content and activities can be tailored to fit with delivery over fewer sessions without sacrificing learning outcomes. They also gained added understanding of the strengths and limitations of delivering through a webinar format.

STRENGTHENING RELATIONSHIPS AND REPUTATION

Most projects reported that they had developed new relationships and/or rekindled existing relationships with employers and other organisations. They perceive this activity to have helped raise awareness and enhance the reputation of their organisation and has the potential to provide and/or support future opportunities and activities. One project has already been commissioned to run future courses for a local older people's project and for the local Clinical Commissioning Group.

REACHING NEW CLIENTS

All delivery organisations have reached new clients with their courses, rather than delivering to individuals and groups already known to them. The projects were an opportunity for them to provide a new offer to new people, and increased their ability to reach an older age group.

Two organisations also reported that it had helped them to recognise the potential benefit of this type of intervention (focusing on resilience and transitions) for other groups, not just those in later life. They had included other participants not approaching retirement (or recently retired), in their courses, and found that these people also responded very positively to the courses.

One project also reported that delivery to different groups, such as prisoners, had helped to break down their own stereotypes and perceptions about how they thought some groups would engage with and respond to certain content and activities.

DELIVERING THROUGH OTHERS

One project's initial approach was to build others' capacity to deliver in the future, through the development of open source material which is handed over to the organisation after a period of co-delivery. This is an approach that some other projects now see as being the most effective way of achieving scale and long-term sustainability, with several planning to do so in the next phase of their project. Some projects will also support this with co-delivery and/or 'train the trainer' before handover.

CATALYSING ORGANISATIONAL CHANGE

One employer-based project, within a large NHS organisation, has helped to highlight issues relating to how older workers are supported. The project has been the catalyst for the organisation to start a task and finish group on the subject, which will inform the organisation's wellbeing strategy and therefore have an influence on support for the whole workforce in future.

7

CONCLUSIONS AND RECOMMENDATIONS

The following conclusions and recommendations focus on:

- types of participant outcomes
- the components that appeared to be critical in participants achieving outcomes
- what this means for future delivery, evaluation and outcome measurement
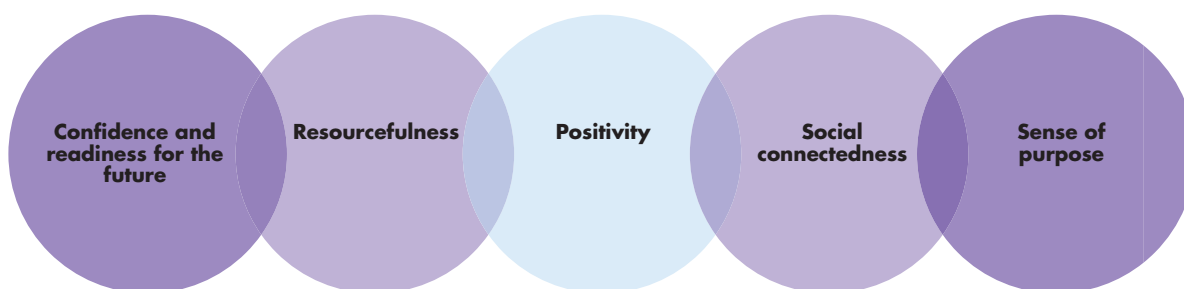
PARTICIPANT OUTCOMES

In the qualitative interviews, all participants reported transformative differences in their attitude and outlook as a result of the course. These fell into the five categories shown below.

The survey findings found positive changes for the respondents for the three factors being measured: wellbeing, social connectedness and resilience, but the degree of change indicated by the validated tools is more modest than that reported in qualitative interviews.

The findings overall suggest that there is - at a minimum - a group of people for whom group-based psychosocial interventions are effective in improving confidence, changing attitudes and preparing for or managing the transition into retirement and later life.

The possible reasons for the difference in scale between the qualitative and quantitative research have been discussed in the report, and suggest for the next phase or similar evaluations that:

- evaluation needs to aim explore the full range of experiences of participants to understand whether some people respond differently to others, both to the overall experience and to specific aspects of content
- targeted outcome measures may be better than validated tools (with a broader focus such as wellbeing) at detecting specific changes
- the five categories above form a basis for sourcing outcome measures for evaluation of these projects in the next phase

| Confidence and readiness for the future | Resourcefulness | Positivity | Social connectedness | Sense of purpose |

CRITICAL SUCCESS FACTORS

One of our core objectives for the evaluation was to understand which aspects of delivery led to participant outcomes. Every project tested different combinations of content and different modes of delivery, and we aimed to identify the critical success factors and most impactful types and styles of content.

Participants consistently described the most valuable and useful aspects of their courses in terms of process and delivery style rather than in terms of content. Analysis of this feedback revealed six interdependent process factors which appear to have contributed to the outcomes achieved by participants, as shown below:

- **space and time** – dedicated and facilitated 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/real-life stories 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'

Interventions aiming to provide psychosocial support to people approaching or going through the retirement transition should be based on the six critical process factors listed above. These provide a framework, which should be supported with a combination of different content, tools and techniques to fit with participants' different preferences.

The evaluation findings do not indicate any common preference of participants for specific types or combinations of content. However, it was difficult to investigate this in the evaluation, especially with participants' limited ability to name techniques they experienced 6-12 months previously. A different type of investigation would be needed in future evaluation in order to distinguish between the usefulness of different techniques.

We note that several projects are looking at building others' capacity to deliver courses in future, and as facilitation is so important to the projects' success, it will be important to define the type of facilitation skills needed in more detail. These are not courses that can be delivered according to a 'script' by a trainer inexperienced in the subject matter of, and the tools and techniques available to support, wellbeing and resilience.
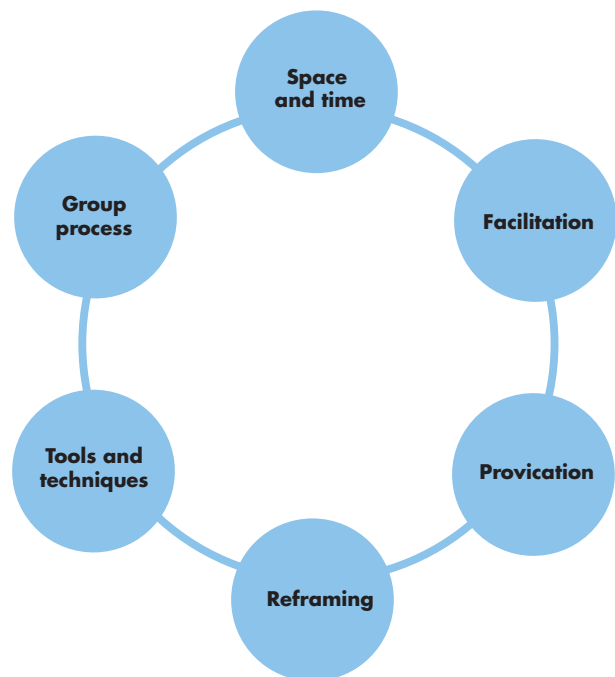
APPENDIX **1**
OVERVIEW OF EACH PROJECT

Delivery organisation	Number of sessions	Session frequency	Session duration	Key components/content
Age and Opportunity	3	Consecutive working days (Fri, Mon, Tues)	7 hours	• Understanding resilience • Understanding self • Understanding change as we age and the factors that influence this • Managing change and challenges • Assertiveness • Recognising skills and strengths • Planning/goal setting • Learning to be optimistic and resilient • Creative problem solving/solutions • Money and peace of mind • Reflection (past transitions)
Beth Johnson Foundation	1	N/A	7 hours	• Planning for later life – underpinned and aligned to the 5 ways to wellbeing • Preparing for later life – mindfulness and CBT techniques • Acceptance and adjustment to future changes and challenges
Centre for Policy on Ageing	3	Weekly	2.5 hours 5 hours 2.5 hours	• Reflective practice, mindfulness and reflective walk • Storytelling (others' and own stories) • Personal coaching (use of coaching techniques rather than individual coaching sessions) • Finding purpose and opportunity

Cheshire and Wirral Partnership	2	Daily (consecutive days)	7 hours	• Understanding what makes us mentally and emotionally healthy and resilient
				• Developing resilience – tools and techniques
				  – Positive thinking
				  – Visualisation
				  – Attentional control
				  – Anxiety control
				  – Practical goal setting
				  – Biofeedback
				• Complementary tools and techniques
				  – Fatigue
				  – Mindfulness
				  – Change Theory and management
				• Action planning

Delivery organisation	Number of sessions	Session frequency	Session duration	Key components/content
Manchester MIND	6	Weekly	2 hours (though session 5 and 6 extended to 2.5 hours in later courses)	• Perceptions of retirement and myth busting • Relaxation, breathing techniques and mindfulness • Understanding and normalising anxiety • Balancing out the negative biasUnderstanding thoughts • Learning about own worries and working on them • Basic CBT • Stress relievers • Self-compassion • Personal strengths and changing identities • Social networks • Goal setting • Signposting and sharing of activities and networks • Learning about comfort zones and setting challenges
Positive Ageing Associates	8	Weekly	2.5 hours	• Drawn from Positive Ageing Theory, Positive Psychology, Mindfulness and CBT: – Myth busting – Five ways to wellbeing – Link between thoughts and feelings – if you can change thoughts you can change feelings – Mindfulness – Positive emotions and cultivating positivity – Identifying and using personal strengths – The role of optimism and strategy for learning optimism – The role of self purpose and developing self purpose – Planning for the future
	6	Weekly	2.5 hours	
	4 (webinar format)	Weekly	2.5 hours	
	2	Consecutive days	7 hours	
	6	Weekly	3.5 hours	
Workers Educational Association	3	Monthly	6 hours	• Mindfulness • Life cycle / mind mapping • Reflective writing • Relaxation and movement – Qi Kung – Deep relaxation
	6	Weekly	2.5 hours	

METHODOLOGY

Core components of the methodology

The table below shows the different methods used.

Data source	Methods used	When
Participants	**Quantitative** Survey questionnaires incorporating three validated questionnaires: ● Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS) ● The Resilience Centre's 14-item Resilience Scale ● The Campaign to End Loneliness measurement tool In addition, the surveys also included bespoke questions that were developed to explore: ● participants' levels of confidence in relation to coping with challenges and change in the future ● participants' confidence in maintaining existing relationships and/or developing new relationships that would meet their needs	● Before course participation (Pre) ● Immediately after course completion (Post) ● Three months after course completion (3m) ● Around six months after course completion (6m)
	Qualitative Semi-structured telephone interviews with 17 participants, lasting 30-45 minutes each	6-12 months after course completion
	Analysis of transcripts of external interviews with 12 participants, provided by one of the projects	6-12 months after course completion
Project delivery staff	Semi-structured interviews lasting between one and two hours	Towards the end of delivery
	Semi-structured follow-up interviews lasting around twenty minutes	After completion of delivery
Project applications and reports	Review of each project's: ● original funding application ● interim report ● final report	Original applications at the beginning of the evaluation Interim reports in advance of first semi-structured interview with project staff member Final reports in advance of final reporting

Survey data entry

Five projects sent their surveys back to Brightpurpose in hard copy, for data entry by our administrative team. Two projects had a member of staff input the survey responses into the data entry spreadsheet provided to them by Brightpurpose.

Sampling for participant interviews

All projects were asked to seek consent from past participants to participate in the semi-structured participant interviews. Five projects did so, but we do not have details of how many participants were contacted. The contact details of those consenting to be interviewed were supplied to the Brightpurpose team. All who consented were interviewed.

Two projects did not contact participants, as they had already asked participants for qualitative feedback. One had involved participants in providing video feedback, and we were provided with an edited montage of this. One had commissioned an external evaluator to conduct semi-structured interviews with a sample of participants, to answer the project's evaluation questions. We were provided with transcripts of those interviews to include in our analysis.

Selecting validated tools for participant surveys

The programme's theory of change identified changes in mental wellbeing, resilience and social connectedness as desired outcomes for participants. We identified validated tools to measure these changes, as follows:

Wellbeing

The WEMWBS was selected because it is widely used and its dimensions offered a very close fit with the programme's objectives. It was also being used in the evaluation of another of the Calouste Gulbenkian Foundation's (UK Branch) programmes.

Social Connectedness

We were unable to find a suitable validated measure of social connectedness. We therefore agreed with the Calouste Gulbenkian Foundation (UK Branch) and the Centre for Ageing Better that a measure of loneliness would be acceptable as a reverse proxy. We considered three tools:

- the Campaign to End Loneliness measurement tool
- the Three Item Loneliness Scale
- the Revised UCLA Loneliness Scale (R-UCLA)

The R-UCLA was rejected for its length (20 items). The Campaign to End Loneliness measurement tool was selected in preference to the Three-Item Loneliness Scale for two reasons: firstly, it was designed specifically for later life, and secondly the language used was positive and does not mention the word 'loneliness'. As we were aiming to measure connectedness rather than loneliness, we agreed with the programme team that this would be a better fit.

To prevent confusion, we refer to loneliness rather than social connectedness when we present the findings of the surveys throughout the report.

Resilience

Selecting a measure for resilience was less straightforward, as the evidence base in this field is still developing, and there is not a clear and shared understanding as to what resilience is or how it should be measured. We referred to a previous review of resilience measures by Windle et al[15] to inform our selection, and sought advice from the Centre for Ageing Better, which at the time was working with a reference group of researchers in this field. The evidence and the current thinking pointed to there being no ideal measure to suit our needs. We selected the 14-item Resilience Scale (RS-14) for the following reasons:

- it was developed originally for older women
- it has a relatively small number of items
- the items appeared to be a good fit with the programme objectives

APPENDIX **3**
PARTICIPANT DEMOGRAPHICS

The data for this section is drawn from baseline evaluation questionnaires, completed when participants joined the course. Not every participant completed a questionnaire.

Participant profile

Participants ranged in age from 40 to over 85, but, as shown in the figure below, the majority of participants were in their late 50s and early 60s. 75% were female and 25% male. The overwhelming majority (95%) described their ethnicity as White, with 3% Asian, 2% Black and 1% Mixed. (Fig. 10)

We asked participants about their employment status. 28% were already retired, 53% were employed and 8% were self-employed. About one third of those employed were working part time. Of the remaining 10% respondents, 36% were unable to work, 39% were unemployed and 24% categorised their employment status as 'other'.

We also asked about participants' relationship status. 62% were living with a partner and 38% were not. The figure below shows the distribution of responses. (Fig. 11)
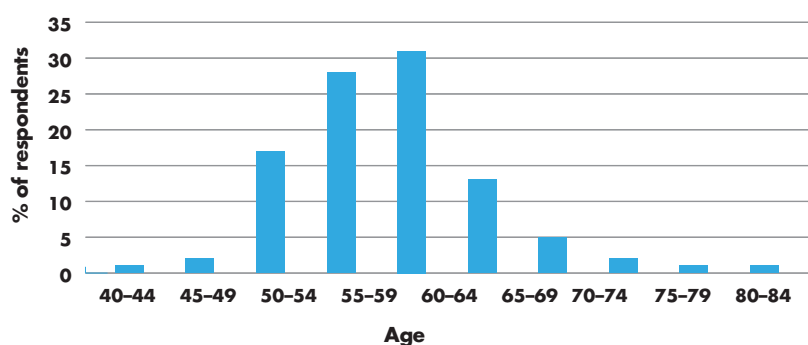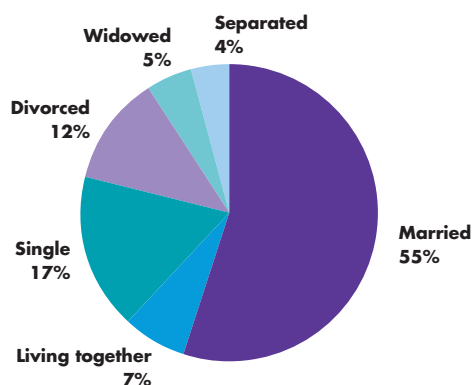
FIG. 10. Age distribution
n=331

FIG. 11. Marital status
n=327

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.