



## Evaluation of pilot projects

Supporting people through the transition  
into retirement

---

Calouste Gulbenkian Foundation UK Branch  
and the Centre for Ageing Better

# About the evaluation

---

This report summarises the findings of an evaluation of seven pilot projects. These group-based courses were aimed at building the resilience and emotional wellbeing of people aged 50 and over who are approaching retirement. The pilot projects, funded by the Calouste Gulbenkian Foundation (UK Branch) used a combination of:

- Planning and goal setting
- Self-reflection
- Story-telling
- Relaxation techniques
- Mindfulness
- Meditation
- Cognitive Behavioural Therapy

The findings are based on qualitative interviews with participants 6-12 months on, as well as quantitative data collected at the start and end of the course, and follow up points. The findings demonstrate promise rather than impact, as well as principles for delivery. They

should be of interest to anyone working with people approaching retirement or interested in wellbeing in later life.

---

## 1 in 5

**UK adults found it difficult to adjust to retirement, and 56% didn't do anything to prepare**

---

This evaluation was co-commissioned by the Calouste Gulbenkian Foundation UK Branch and the Centre for Ageing Better as part of a partnership focused on using evidence and innovation to explore ways to help people better manage major life changes as they age. The focus of this work to date has been on understanding retirement as a widely experienced transition that is often underplayed but can be challenging for some. The evaluation was carried out by Brightpurpose.



It's not something I had given a great deal of thought to... having that time, and forcing yourself to think further ahead has been so useful and has made me feel more prepared.

---



# What we found: outcomes

---

## Feeling confident about the future

People felt that having the time to reflect, to think about what they wanted and how that could be achieved left them feeling in greater control and more confident about their future. People felt more equipped to deal with change and face challenges head on.

---

**'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.'**

---

## Resourcefulness

People found that reflecting and taking stock of their strengths, skills and personal attributes gave them a greater sense of self-belief, particularly amongst people that had felt they had little to offer previously.

---

Those planning to retire in the next five years:

**32%**

worry about missing social connections

**24%**

worry about losing purpose

**33%**

worry about feeling bored

---

**'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. It was reassuring and gave me confidence that if I've done it before I can do it again.'**

---

## More positive attitudes to ageing

People 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, with increased optimism and a desire to make the most of this stage of life.

---

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

---





## Feeling more connected to others

People had a greater appreciation of how important their social relationships were and the important role these relationships would play in their life going forward. For those approaching retirement, they acknowledged that the workplace had provided a lot of their relationships, interaction and support, and that this would change once they retired.

.....

**'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 make a contribution.'**

.....

## Sense of purpose

People spoke about the sense of purpose that they got from work and their anxiety about the gap retirement would leave in their lives. Going on the course helped to alleviate some of these concerns, helping them to see that the end of working life does not mean the end of doing something constructive, worthwhile and valued.

.....

# 39%

**Of those who wanted more support to help them prepare for retirement, 39% wanted advice on how it would affect them emotionally**

.....

## Six key elements for supporting transitions

The evaluation found six interdependent elements were essential in bringing about these positive outcomes for people:

**1. Space and time** – provide dedicated time where people can reflect on changes, challenges and opportunities ahead.

**2. Facilitation** – create a safe space, where discussions and reflection are supported.

**3. Provocation** – use scenarios, case studies and discussion points that encourage people to think about different situations and to think differently about themselves.

**4. Reframing** – present later life as a life stage with positive opportunities, challenging stereotypes about ageing and encouraging participants to take control of their future.

**5. Tools and techniques** – provide a range of tools to enable reflection, help people think differently and plan for the future.

**6. Group process** – support people to share their experiences of going through transitions and make sure the group hears the different perspectives from people in the 'same boat'.

.....

These principles will be helpful to organisations that want to improve their existing provision or design new services to support the retirement transition.

# How we're using this evidence

---

We want more support to be available for people approaching or experiencing transitions in later life, such as retirement. Support that prioritises people's psychological and emotional wellbeing in later life would be a useful addition to traditional approaches that focus on financial and practical advice to people approaching retirement.

To do this, we are working with voluntary organisations, service providers and public and private sector employers to share evidence from promising approaches, encourage them to consider a more holistic offer and share emerging principles to support delivery.

These findings will inform a second evaluation, which will also investigate the benefits to employers in running these types of courses.

We are also undertaking an evidence review to understand who finds the retirement transition challenging and what their experience is.

## Find out more

---

For more on the findings, read the 'Evaluation of transitions in later life pilot projects' executive summary and full report at [www.ageing-better.org.uk/till](http://www.ageing-better.org.uk/till)

Get in contact if you'd like to know more about the projects or the work we are doing to improve the experience of transitions in later life.

 [www.ageing-better.org.uk](http://www.ageing-better.org.uk)

 @Ageing\_Better

 [info@ageing-better.org.uk](mailto:info@ageing-better.org.uk)

 [www.gulbenkian.pt/uk-branch](http://www.gulbenkian.pt/uk-branch)

 @CGF\_UK

 [info@gulbenkian.org.uk](mailto:info@gulbenkian.org.uk)

This report is available at [www.ageing-better.org.uk](http://www.ageing-better.org.uk) and [www.gulbenkian.pt/uk-branch](http://www.gulbenkian.pt/uk-branch)

---



The Centre for Ageing Better received £50 million 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.



The Calouste Gulbenkian Foundation (UK Branch) aspires to bring about long-term improvements in wellbeing, particularly for the most vulnerable, by creating connections across boundaries which deliver social, cultural and environmental value.