

TRANSITIONS IN LATER LIFE

LEARNING COMMUNITY
2016–17

SUMMARY OF LEARNING



CALOUSTE GULBENKIAN
FOUNDATION

UK BRANCH

INTRODUCTION

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. Our Transitions in Later Life (TiLL) programme aims to help people in mid to later life feel better supported to manage changes as they age.

The TiLL programme supports a cohort of organisations that are piloting group-based interventions that focus on building emotional wellbeing and resilience (see Annex 1 for descriptions of supported projects). We bring this cohort together as a learning community three times a year to share practice, develop new approaches and share insights that emerge over the course of project delivery. The Centre for Ageing Better, our evidence and evaluation partner, also participates in the learning community. With this group, we seek to move beyond data collection to the generation of learning.

This document outlines learning that has emerged thus far into key themes. It also includes a summary of lessons that we have learnt on running learning communities in this way, as reviewed by an external consultant. We hope this will inform others who are working in this sector and/or are interested in working with partners in this way.

For further information on the TiLL programme, please contact ageing@gulbenkian.org.uk.

WHY THIS APPROACH?

People in mid-life are often encouraged to plan financially for their later years. However, there is little resource or knowledge on how to plan emotionally and psychologically for this time. Transitions such as retirement, moving out of the family home or a deterioration in health are often difficult. They can for example, lead to loneliness and isolation which impact on mental and physical health.

The learning community have been developing interventions that enable people in mid to later life focus on 'what next?'. The projects use approaches like guided self-reflection and provide vital tools for handling life transitions. An evaluation of the pilot projects, run by the members of the learning community, found that these approaches improved confidence, readiness for the future and outlook on later life. See bit.ly/tillphaseone for more.

Summary of learning: Transitions in Later Life learning community 2016–17

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UK Branch

www.gulbenkian.pt/uk-branch

BACKGROUND

THE LEARNING COMMUNITY AIMS TO:

- **enable partners to share their experience of the work supported through the strand and the learning they are deriving from it;**
- **identify issues or projects on which to work collectively and which contribute to achieving the desired strand outcomes and following them through;**
- **inform project and programme level learning to be integrated into the programme evaluation.**

In its first year in 2016, the learning community focused on sharing reflections from their individual work, including the challenges and opportunities they were experiencing while delivering each of their pilot projects. In 2017, many of the organisations involved in the learning community received funding to develop their projects further. This includes working with new partners and new groups of participants.

To support this, the scope of learning community grew. We began to invite in and hear from external organisations, including Spring Impact, the Psychosynthesis Trust and project leads from the Mid-Life Career Review. We did this not only to consolidate and reflect on the learning that was emerging in the individual TiLL projects, but also to build the capacity of the members of the learning community organisations, and to begin to tackle larger issues e.g. problems of scale, the obstacles facing the sector more widely and the problem of ageism. You can read more about what was covered in these meetings on our website: gulbenkian.pt/uk-branch/our-work/transitions-in-later-life/

A typical learning community might involve:

- Updates from member organisations since the last meeting
- Sharing learning on a theme such as facilitation skills or communications
- A session from an external partner; for example, systems mapping with Jen Morgan from the Psychosynthesis Trust
- Discussing the trajectory for the learning community e.g. planning yearly focus or looking at the TiLL evaluation.

Over the past two years, the learning community has developed into a cohesive unit – building trust and personal relationships have been central to this. We share reflections on this process at the end of this document.

“What we gain is a strengthening of conviction that individuals do benefit from TiLL interventions – that we are on the right track. This is very important in this space as nobody else is doing things like this.”

KEY LEARNING ON WORKING IN THIS SECTOR

(TARGET) AUDIENCE

The projects in the learning community work with different audiences – across a breadth of groups including people who are mid-career, those approaching retirement, those not in work and people facing multiple challenges e.g. caring for family members and people with long-term health conditions. The learning community seek to recruit a broad range of people who want to think ahead and plan for their future.

We believe that beginning the preparation for major changes in later life at an earlier stage, such as in mid-life, will empower people to approach changes with greater confidence. However, the evaluation of our pilot projects (see bit.ly/tillphaseone) also found that the participants in the TiLL courses who were already retired still exhibited positive outcomes from the interventions, and felt that they were beneficial.

The question of what age these interventions are targeted at arose across meetings. It is difficult to target a specific group without limiting your audience. The learning community agree that we are inclined not to put an age or number on advertising materials. However, we have found that using numbers can be a useful way to get participants into sessions – helping people to recognise that the sessions are applicable to them, meaning that they feel more entitled to attend. Loosely, using a target age for 50+ for people in the workplace has proved effective, as this is felt to be the point at which people in mid-life feel prompted to think about their future.

Men are also identified as a key target audience – as a group who are generally less engaged with health and social provision, men may be less likely to consider their needs around emotional wellbeing and are far less likely than women to join discussions of later life and resilience.

ROUTES TO MARKET

The organisations in the TiLL learning community loosely recruit through one or both of two routes: through employers or through community organisations (including local area groups, faith organisations and sector organisations e.g. federations).

Employers are a useful target because they can provide access to a lot of people. In many cases employers act as a trusted intermediary to support, that touches on issues like retirement and planning. These projects also provide a positive and productive way of fostering better relationships and discussions between employers and employees, which could ultimately benefit both sides.

We also want employers to see themselves as a crucial part of a prevention chain aimed at future-proofing issues for people in later life and adjusting to the demographic changes in society. This is in opposition to only providing pensions support, or troubleshooting issues at crisis-moment. Young managers have been interested in these interventions in terms of how they can better support their older workers.

Mapping markets to identify groups to target is helpful. Identifying key individuals in a partner organisation is often vital – they can be a gatekeeper to senior buy-in and embedding the project in the organisations' longer-term priorities. A key individual's understanding of the project also ensures the course is marketed in the right way.

“It is now less linked to retirement and focusing more on “mid-life”. What age this is depends on what transitions people have gone through... The issue is: at what point should people take stock and prepare for the future?”

MARKETING WORK

This is a relatively new area of work and therefore comes with the challenge of communicating to new audiences.

The learning community market this work to (a) employers and/or community partners and (b) potential course participants (individuals). Different marketing works with different groups of people and therefore it needs adaptation.

Employers worried about staff shortages may respond to the importance and cost savings of retaining staff over, or alongside, recruiting new employees. For this case, it is vital to frame the work as ‘pre-retirement’ – i.e. for people who might be 10 or 20 years away from retiring. Staff members who go on these courses and remain in work will likely be happier, healthier and more motivated. Therefore, this approach will help the employer to better manage their ageing workforce and build a robust succession plan.

For some, including **policy-makers and civic-minded employers**, a message of civic engagement can be stressed: promoting volunteering opportunities, mentoring opportunities, and blended retirement (e.g. scaling back hours to slow the transition). This may complement both corporate social responsibility and human resources priorities. These courses need to be communicated as focusing on the self, not as succession-planning.

For **individuals**, learning community members have found it effective to use a prevention message: communicating that preparing for later life is one way of guarding against issues such as loneliness or cliff-edge retirement (going from full-time employment to stopping work suddenly, often with little or no preparation). For many, later life is an opportunity to pursue personal goals or interests, such as learning a new skill or setting up a business.

POSITIVITY AND POSITIVE MESSAGING

Later life is associated with a number of negative assumptions and stereotypes. Many of these are negative and detrimental to the cause. For instance, later life is sometimes regarded as inherently fragile and listless. It is sometimes assumed that we stop learning or that people in late life are less open to new experiences. ‘Later life’ is often thought about as a separate and distinct period of time, assumed to begin at retirement. People may not invest time or resources in planning the later life they want to lead.

Positivity is an important tool to combat the stigma associated with ageing. It is a key aspect of reframing the discussion around ageing: to be one about empowerment and resilience. Emotional wellbeing is at the heart of resilience, and greater understanding of the emotional impact of transitions in later life like retirement is needed. However, we need to balance optimistic language alongside painting an accurate picture of ageing. There are losses to balance with the gains – and we must acknowledge the challenges that people face.

Those working in this field must not fall into the trap of continuing the harmful assumptions by accident. Relying on words such as ‘retirement’, ‘old’ or ‘preventative ageing’ can have negative connotations – we can’t prevent ageing (nor do we want to). Using phrasing such as ‘positive ageing’ could be appropriate in some circumstances.

USING CASE STUDIES

Case studies have proved a useful medium for telling the story of what interventions are needed to support transitions in a more holistic way. It is important to be sensitive when writing up sensitive topics, but participants are often more willing to contribute anonymously.

We have created a series of podcasts for the TiLL projects:
bit.ly/LaterLifePodcasts

SCALING WORK

There are different motivations for scaling. For TiLL partners, scaling often means reaching a wider audience and building the resilience for more people. For some it also means scaling a new mindset: challenging the stereotypes that affect people as we age and moving to influence policy.

With the TiLL cohort are moving into Phase Two of their projects in 2017, we discussed how this work might be scaled. Spring Impact worked with the group for a session on scaling social impact.

Routes to scale range from wholly-owned scale (e.g. opening a second branch of your organisation in a new location) through to dissemination of an open source tool; these allow a different degree of control or ownership. Each route has its own benefits.

It is important to step back and reflect on the ‘impact goals’ of our work. An impact goal defines the change that we seek to achieve over a set timeframe – more specific of our impact than our mission might be. Knowing this will help us to decide the path we move down.

‘TRAIN THE TRAINER’ MODEL

In their Phase Two projects, many of the learning community organisations chose to use a ‘train the trainer’ model to spread the impact of their work.

This approach has its benefits. For one, it involves upskilling people, inviting them to learn and grow as a teacher. This will also develop the sector. When this involves meeting and training new facilitators directly, this allows the experienced trainer to impart their knowledge and learning to them. It also allows some degree of vetting new trainers to ensure that the experienced trainer is confident that they are suited to this role.

However, herein lies some of the difficulty: training new trainers involves releasing content to be delivered by a new face. This involves identifying and building trust with people who can deliver this work with authenticity.

The community believe that facilitators should:

- Have the ability to manage diversity
- Be proactive and responsive
- Be warm and authentic in delivery
- Have a commitment to course aim and content

Some cohort members have been working with trained coaches. The group generally agreed that it is easier to teach the course content to someone outside of the sector if they have these skills, than it is to teach these skills to someone with knowledge of the sector. Having the trainee attend the course, to experience the content themselves before delivering it, was helpful.

Learning community members have found that a trainer’s age doesn’t necessarily matter – sharing between age groups can add to the experiences. Rather, it is more important that the trainer has respect for the course content and people’s experiences.

LESSONS LEARNT ON FORMING LEARNING COMMUNITIES

Each year we review the learning community. We work with an external consultant who conducts interviews with the learning community members to understand how they have found the sessions. We use the feedback to continually improve these sessions and ensure that they are adding value to each organisation's work. Our key learning from these reviews is summarised below.

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1. **Building trust and relationships takes time**, but this is an important part of the process and deserves time (and space) because the benefits are exponential. Trust is central to creating an open environment where community members can speak honestly and support one another.

“Developing trust has been important and would always take time. This is challenging when you have a room full of leaders.”

“Now we know each other we can have much more in depth conversations.”

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2. **If possible, it is beneficial to have the same participants at every meeting**, which ensures consistent representation from each organisation – this relates to the importance of trust and personal relationships.

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3. **Session content needs to be flexible** and respond to the learning community's interest and the direction of the projects. It is valuable to develop meeting themes in conjunction with learning community members to ensure that stimulating and relevant content is covered.

“We were always asked what we want to do next... I liked that we could flag up in the moment if something was not working and they would be flexible enough to change it.”

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4. **Sharing course tools is really valuable**. In 2017, several learning community members led experiential sessions at meetings where they took the group through an exercise they use in their own course. The group found this overwhelmingly beneficial because it inspired them to think about their own practice. It also enables them to experience the impact of the different approaches used by the learning community.

“I learned an incredible amount – opened up my eyes ... the learning community has helped us understand the life stories/reasons underpinning this work.”

5. **Be aware of the differences between approach or focus of different community members.** We spent a lot of time focusing on commonalities between organisations, but it is important to discuss the differences in the room. For instance, course participants varied greatly from professionals to people more isolated in their communities:

“Listening to others in the learning community talk about ageing well – for most of our organisation’s client group this is an impossible aspiration for them – they are living crisis week to week.”

6. **Carefully consider who is in the room.** It is useful if learning community members are at a similar stage in their journey. The cohort members work with different audiences and use different tools but having all worked on pilot projects at the same time, gave them a degree of commonality which made it easier to learn from one another. This should be considered when bringing in external partners too. The learning community are keen to hear and learn from others but choosing who and when is best done in partnership with the learning community.

7. **It can be useful to create shared outputs** (resources or other materials) that capture and distil the learning that emerges within the learning community. Materials can be particularly valuable for learning community representatives to take back to their organisations and share with partners to communicate the learning and this approach.

WHAT NEXT?

The learning community will continue to meet in 2018 as the projects complete their work for Phase Two. We will continue to focus on supporting each other with learning from challenges and maximising opportunities, extracting learning as it emerges.

We are also keen to share our learning more widely with the sector in 2018 and to increase the external presence of the learning community. We will work with others to look more closely at issues like ageism, and how it relates to planning for, and resilience in, later life.

We are already thinking about the legacy of the community too. Members are keen for it to continue in some fashion, perhaps as an informal peer support group. We will explore how we can create legacy products as outputs of the learning community and plan for moments when we can bring the sector together around the issues.

ANNEX 1

MEMBERS OF THE TRANSITIONS IN LATER LIFE (TILL) LEARNING COMMUNITY

Age & Opportunity

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

Beth Johnson Foundation

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

Ageing without Children (AWOC)

AWOC partnered with the Beth Johnson Foundation on a TiLL project in 2016. AWOC campaign and provide information to support people over the age of 50 without adult children, including research into the needs and experiences of people ageing without children and running of an online community.

Centre for Policy on Ageing

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

Cheshire and Wirral Partnership NHS Trust (CWP)

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

Citizens Advice

Citizens Advice initially ran a Design Pioneer Programme to design five new services aimed at improving the finances, social inclusion and wellbeing of people approaching or living in retirement. We are now working with Citizens Advice on an in-depth research project that seeks to understand what barriers people face when planning for later life, in advance of the state pension age.

Manchester Mind

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

Positive Ageing Associates

Positive Ageing and Resilience Training (PART) is a programme from Guy Robertson of Positive Ageing Associates with Miriam Akhtar of Positive Psychology Training. The eight-module course focuses on the emotional and psychological aspects of ageing with the intended outcome of enabling older people to increase their resilience to the challenges of later life.

Tavistock Relationships

Tavistock Relationships supports and improves the quality of couples' relationships by building resilience and strengthening the ability of the couple to act as a protective resource. Its project aims to develop a replicable pilot model for a preventative relationship 'MOT' check-up for 50+ couples, involving face-to-face sessions and a video addressing relevant issues.

Workers' Educational Association (Scotland)

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

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.

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