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<th>Strategic Approach for Promoting Retirement Preparation - Innovative Use of Active Interest Development and Senior Mentorship</th>
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Strategic approach for promoting retirement preparation

- Innovative use of active interest development & senior mentorship

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Individual level:
Challenges of Retirement

- A major life event ➔ Readjustment needed
- A very first step to the ‘golden age’
- But maladjustment is common (Wang, 2007; Siegrist et al., 2004)
  - Substantial psychosocial distress
  - Anxiety & depression ↑
  - Life satisfaction ↓
- Role & activity theories explanation
  - Work ➔ non-work identity
  - Social network ↓
  - Life routine & structure disorganized
- Family relationship
  - Protective or risk factors?..........depends?
Society level:
A public health concern!

• ~60,000 retirees every year in HK (Census & Statistic Dept., 2012) ➔ service needs!!!
• Due to the resources constraints, current practice of corporates are
  – Information pamphlets, one-off seminars
  ➔ Inadequate for real, sustained behavioral changes

Baby boomers’ effect ➔
Peak of retirement to come in ~2018!!

Census and Statistics Department, 2012
Interventions for retirement preparation

• Two contradictory requirements
  1. Sufficient dosage ➔ real behavioral changes
  2. Affordable to corporates (or the society as a whole)

• Existing interventions
  – Some evidence of efficacy
  – But simply being ‘effective’ is NOT good enough
  – Needs to be COST EFFECTIVE ➔ a UNIVERSAL service for all soon-to-retire people

A strategic approach

• Positive entry point: Active interest development
  – Active vs. passive interest
  – Role: active participants vs. passive receivers
  – Challenging, meaning, engagement
  – Evidence: a strong protective factor of retirement adjustment (Nimord, 2007)
  – But highly preferably be developed BEFORE retirement!

• Affordability & sustainability: Senior mentorship scheme
  – Successful retirees trained as mentors
  – Acceptability & dosage ↑

  This year’s mentees can be next year’s mentors
  ➔ Organic growth of the mentor pool
AIMS
(Active Interest Mentorship Scheme)

- Funded by CADENZA Community Project, HKJC Charity Trust
- NGO collaborator: Employees Development Service, Hong Kong Christian Service
- Period: Feb 2011 – Jan 2013

Deliverables

- Program kit
  - Training kit & guidebook for mentors
  - Guidebook for mentees
  - Resources kit of local mentees
- Running the demonstration mentorship program
- Train-the-trainers: HRM & social service professionals
- Website on active interests & retirement preparation: [http://www.aims.org.hk](http://www.aims.org.hk)
- HK Active Interests Expo – organized twice
- Symposium on Active Interests Culture Development
- Spin off AIMS groups in over 11 local cooperates
- International interests
  - Singapore Council for 3rd Age; New York mental health service
Operation of the mentorship program

1. Recruitment & training of mentors (successfully retired people) ➔ become a coach & companion
2. Recruitment of mentees, the soon-to-retire people, ~6 months before retirement
3. Matching
   - 1 mentors to 1 to 3 mentees
   - Match (1) gender, & (2) occupational status (support or managerial/professional)
4. Regular supervision & support for mentors
   - Difficult cases, boundary & ethical issues
5. Mentees stay in program until ~6 months after retirement
6. Interested mentees may join the mentor pool ➔ REPEAT Step 1 ➔ sustainability & organic growth

Helping mentee to explore interests suitable to him/her

• We developed the 8-dimension framework of interests
• A person indicates his/her personal orientation on the 8 dimensions
• Our web-based software may provide suggestions matching his/her preferences
Research

• Objective
  – Examine the protective value of AIMS on the mental health of the mentees

• Design
  – 1-year longitudinal f/u
  – i.e. 0.5 year before retirement to 0.5 year after retirement
  – 4 waves of measure; Interval = 4 months
    • T1: -6 months; T2: -2 months;
    • T3: +2months; T4: +6months
Measures

• Rosenberg Self-esteem Scale (SES, Rosenberg, 1965)
• Satisfaction with Life Scale (SWLS, Diener et al., 1985)
• Hospital Anxiety & Depression Scale (HADS, Snaith, 2003)
• Physical Distress Scale (PD, Ng et al., 2005)
• Positive Affect Scale (PA, Ng et al., 2005)

Participants

• N (completed all 4 waves of measures) = 31
  – [N (agreed to participate in the study) = 40]
• Gender:
  – Male: 18 (58%)  Female: 13 (42%)
• Age:
  – 50-54: 7(22.6%)  55-59: 9(29%)
  – 60-65: 15(48.4%)
• Education:
  – Primary school: 1(3.2%)  Secondary school: 11(35.5%)
  – College/university: 12(38.7%)  Postgraduate: 7(22.6%)
Findings
- Changes in outcome measures

Table. Paired sample T-Test of changes from baseline (n=31).

<table>
<thead>
<tr>
<th>Variables</th>
<th>Changes</th>
<th>P-Value (Paired with T1)</th>
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<tbody>
<tr>
<td></td>
<td>T2-T1</td>
<td>T3-T1</td>
</tr>
<tr>
<td>Self-esteem</td>
<td>1.2</td>
<td>1.2</td>
</tr>
<tr>
<td>Life-satisfaction</td>
<td>0.6</td>
<td>-3.8</td>
</tr>
<tr>
<td>Depression</td>
<td>-0.3</td>
<td>0.2</td>
</tr>
<tr>
<td>Anxiety</td>
<td>-1.2</td>
<td>-0.5</td>
</tr>
<tr>
<td>Physical Distress</td>
<td>-8</td>
<td>-3.2</td>
</tr>
<tr>
<td>Positive Affect</td>
<td>4.9</td>
<td>4.6</td>
</tr>
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Note: *p ≤ .05; **p ≤ .01

Trajectory of outcome measures

Figure. Variables’ percentage of changes with baseline T1 from T2 to T4

Note: Tn= (Tn-T1)/T1*100
Discussion

• Except T3, changes in outcome measures at T2 & T4 were in the expected directions
  – Scores of positive outcomes (SES, SWLS, PA) increased or remained similar
  – Scores of negative measures (HADS-D, HADS-A, PD) decreased or remained similar

• Trajectory analysis
  1. Flat curve: SES & PA
  2. V shape: SWLS (positive measure)
  3. Inverted-V shape: HADS-D, HADS-A, PD (negative measures)

• Interpretations
  – T3 (~2 months after retirement): a particularly tough period!
  – SES & PA might be more inherent & internalized qualities ➔ stability thru T1 to T4

Conclusion

• Showed evidence supporting the protective value of AIMS on the mental health of mentees, i.e. the soon-to-retire people
Other observations

- Cost effectiveness
- Low dropout rate of mentors
- High % of mentees willing to become mentors
- Portability of AIMS: Spin-offs to
  - Corporate companies
  - NGOs
  - Even international interests!

Lastly, but no the least.....what do you observe?
Efficacy + Cost effectiveness + Portability + Acceptability

AIMS may be a practical, universal service for ALL soon-to-retire people

THANKS!

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