<table>
<thead>
<tr>
<th><strong>Title</strong></th>
<th>Develop active interests before retirement for better well-being after retirement: a mentorship program for the soon-to-retire persons</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Author(s)</strong></td>
<td>Ng, SM; Wang, X; Fong, TCT; Cheung, N</td>
</tr>
<tr>
<td><strong>Citation</strong></td>
<td>The 2010 Asian Pacific Perspective Regional Conference, Hong Kong, 19-20 November 2010.</td>
</tr>
<tr>
<td><strong>Issued Date</strong></td>
<td>2010</td>
</tr>
<tr>
<td><strong>URL</strong></td>
<td><a href="http://hdl.handle.net/10722/197412">http://hdl.handle.net/10722/197412</a></td>
</tr>
<tr>
<td><strong>Rights</strong></td>
<td></td>
</tr>
</tbody>
</table>
Develop active interests before retirement for better well-being after retirement
- A mentorship program for the soon-to-retire persons

Siu-man Ng, PhD
Department of Social Work & Social Administration
The University of Hong Kong
NGO collaborator: Employee Development Service & Four Dimensions Consulting Ltd., Hong Kong Christian Service

Acknowledgement
The project is funded by the Hong Kong Jockey Club Charities Trust
For many people, successful retirement is the first step towards successful aging!

BUT

Work identity ➔ Non-work identity

A BIG CHALLENGE!!!
A change in life requiring readjustment

- Change ➔ require readjustment ➔ stress
- Social Readjustment Rating Scale (Holmes & Rache, 1967; Rache & Authur, 1978)
  - Retirement ranked the 10th among 43 items
  - Score = 45 (c.f. item 1, death of a spouse, score = 100; item 43, minor violation of law, score = 11)
- Life course theory
  - Retirement: worker identity ➔ elder identity
- Successful transition ➔
  - Avoid abrupt decline in mental health
  - Enhancement of well-being, e.g. self-acceptance, meaning of life, interpersonal relationship
Role theory

• If highly invested in a particular role (e.g. work role), one’s feelings of self-worth tend to be associated with ability to carry out that role ➔ positive self-esteem (Ashforth, 2001)

• Facing loss of the dominant role, need replacements, e.g. partial work role, volunteer role, serious hobbies

• Re-identify with family role?
  — Prerequisite: satisfactory marital/family relationship
  — >50% elderly with a spouse reported marital relationship ‘not too enjoyable’ (Wang, 2008)
Continuity theory
(Engagement theory)

• Remain involved & active ➔ better well-being
• Preserve and maintain existing internal & external structures (Quick & Moen, 1998)

• Internal structure
  – Concept of self & identity

• External structure
  – Roles & activities in physical & social environment

• Rivalry theory: Disengagement theory (Cumming & Henry, 1961)
  – Social withdrawal ➔ focus on personal growth

• Empirical data supports continuity theory
Activity theory

• High level of involvement in meaningful activities ➔ well-being
• Consistent support evidence (Havighurst, 1963; Rowe & Kahn, 1998; Nimord, 2007; Hao, 2008)
Active interests

• Not all activities have positive impacts (Nimrod, 2007; Leung & Lam, 2008)
• Some show no impacts or even negative impacts (e.g. TV & radio)
• ‘Active’ is a key differentiating concept
  – An involved participant, not merely an observer
  – Demand skills, knowledge
  – Rewarding – intrinsic, extrinsic
• Develop new interests after retirement is rarer and more difficult ➔ Preferably to have enduring active interests developed before retirement
Current HRM practice for preparing soon-to-retire staff

- Provide information booklet +/- one-off seminar
- To effect real behavioral changes, more intensive input is needed
- However there is resources implications that may not be acceptable to most corporations
- Using recently successfully retired people as mentor can be a cost-effective, ‘win-win’, self-rolling solution!
Our retirement preparation program

• Entry point:
  – A positive anchor: develop **active interest**
• Intensive but affordable:
  – Making use of successful retirees as **mentors**
Self-sustaining

This year’s mentees can be next year’s mentors!

...........leading to a ‘Retirement mutual-help culture’

&

‘Active interest culture’
Research gap

• Previous studies
  – Mostly cross-sectional & often relied on recall data by subjects (i.e. retrospective)
  – A few studies adopted longitudinal f/u design (i.e. prospective), but merely observational, not experimental or intervention research

• Despite a consensus view on the importance of developing enduring active interests before retirement, no rigorous intervention research has been conducted so far
Research question

• Can mentoring for developing active interests before retirement lead to better mental health after retirement among the retirees?
**Conceptual Model**

**Pre-retirement conditions**
- Nature of retirement (Voluntary vs. involuntary)
- Readiness/worries over retirement (Psychosocial & financial)

**Intervention**
- Mentoring (Intensity & perceived mentor-mentee relationship)

**Individual factors**
- Age, gender, family composition, educational level, occupation
- Financial condition & planning
- Physical health

**Intermediate Outcome**
- Active interest

**Post-retirement work**
- Bridge employment (hours/week)

**Outcome**
- Mental health
2-stage study design

**Pilot Study**

1. Develop program materials
   - Resource kit of local leisure interests
   - Guide book for mentor
   - Guide book for mentee
2. Develop training workshop for mentors
   - Tentatively a 4 weekly sessions design
3. Trial run matching and ongoing supervision logistics with ~10 subjects for ~6 months

**Main Study**

Cluster randomized control trial
1. 2-arm design
2. 55 subjects per arm
3. Will need 40-50 mentors
Main Study: A Cluster Randomized Controlled Trial

Recruitment of study sites (corporations)

Randomization

Randomization at site level for avoiding ‘contamination’ within site

Blinded interviewers

T0: 0.5 year before retirement

Experimental Group
- Regular info service + Mentoring for active interests

Control Group
- Regular info service only

T1: 1 month after retirement

T2: 0.5 year after retirement
Pilot study – Oct 2009 – June 2010
• Developed all necessary program materials
  – Training workshop for mentors
  – Briefing & info for mentees
  – Resource kit on local active interests
  – Logistics for the mentorship scheme

• Trial run with 10 mentors & mentees
  – Training & matching
  – Ongoing supervision & support

• Results:
  – VERY POSITIVE; ZERO DROP OUT; MOTIVATED TO BECOME FUTURE MENTORS
  – HRM of big corporates show keen interest!
Next step

• Proceed to main study when funding is available

THANKS!

Contact: ngsiuman@hku.hk