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<tr>
<td><strong>Author(s)</strong></td>
<td>Ng, SM; Wang, X; Fong, TCT; Cheung, N</td>
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<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>
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Develop active interests before retirement for better well-being after retirement
- A mentorship program for the soon-to-retire persons

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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 10^{th} 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**

快速發展主動型興趣
退休生活充實有生趣
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!

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