

‘Managing Transitions in Later Life’

Sketching a roadmap towards a preventive, holistic and person-centred model of support for later-life transitions

A report of the roundtable held at CGF UK on the 25th of July 2013.

Based on our aspiration to be an open, transparent and engaged funder, we are consulting widely about the future shape of the support we provide under the Ageing and Social Cohesion programme. The consultation was launched in April 2013, and comprises a number of elements in addition to roundtable discussions, including an open invitation to provide comments and submit ideas to which we received 40 useful written responses. In all we held three roundtables with organisations working in the ageing and related fields to exchange ideas and to consider responses. The other round tables considered the themes of ‘all-age-friendly-communities’ and demonstrating the value of intergenerational work.

Introduction

To say that ‘the only constant in life is change’ is a cliché, and yet it is true that throughout life we are regularly faced with circumstances that require us to adapt. As human beings, we are particularly well-equipped to adjust to new situations, and most of us successfully manage it. However, some can be particularly sudden and/or difficult for those experiencing them; bereavement being a clear example of this. In these cases, feelings of isolation and a sense of diminished value might be overpowering and result in loneliness, ill health and depression. These outcomes are not experienced by everyone, however, which indicates that some individuals are able to manage difficult transitions more effectively than others. This suggests that there might be lessons to be drawn and practices to be adopted that could ‘future-proof’ thus delivering significant benefits.

The Ageing and Social Cohesion Programme

The projects that we have supported under the Ageing and Social Cohesion programme (for example the Campaign to End Loneliness) have given us considerable insight into the challenges of transitions in older age. Reflecting on our learning, we have identified ‘Transitions in later life’ as one of the strands that we might focus on to generate real impact, encouraging a shift from ‘firefighting’ to prevention and more person centred approaches. The sections which follow provide a summary of discussion at a roundtable on ‘Managing Transitions in Later Life - Sketching a roadmap towards a preventive, holistic and person-centred model of support for later life transitions’ held at our offices on the 25th July 2013.

The Roundtable

The discussions were facilitated by **Guy Robertson**, Positive Ageing Associates, and focused on three main questions:

- What does 'life transitions' mean and what would 'better managing them' entail?
- What is already happening in this field?
- To what extent is the transitions framework a useful approach to policy and practice?
- How would the CGF (UK Branch) build a programme around transitions?

Conceptualising transitions

The group identified nine transitions, all of them concerning adulthood and, more especially, later life: *reduced mobility or ill health, becoming a carer or a grandparent, bereavement, downsizing, empty-nesting, relationship breakdown, retirement and even dying.*

Five essential characteristics of transitions were identified: **pivotal periods** in life, generally involving a **reduced [sense of] agency and/or loss**, **psychological/emotional changes** in terms of perceptions, identity and sense of purpose, usually having an impact on **material resources**, but also having potential for **personal growth**. It was suggested that the Dilts framework which considers environment, behaviours, capabilities, beliefs, identity, and purpose might also be a useful analysis tool.

The dimensions that might be used to categorise different transitions were also discussed. These include the degree of **agency** possessed by the individual, the capabilities and skills they have at their disposal - since these are likely to have a significant impact on how well they deal with change. The extent to which the transitions are **predictable and/or within their control** is also important, since it conditions the nature of appropriate interventions. **Age** is also salient, as some transitions are specific to particular age ranges or periods in life while others might occur across adulthood (for example bereavement or relationship breakdown). It was suggested that a **life-course** approach might be taken to this work - particularly given the potential for cross-generational support and mentoring around transitions. Finally, the **breadth of impact** of a particular transition will condition who might be concerned (just the individual or also, and to what extent, friends, family, workplace etc.).

Hindrances to resilience

There was a general consensus around the need to help individuals to build resilience and skills to respond to transitions. 'Planning', 'preparing' and 'preventing' were some of the keywords that emerged in the discussions. However, there are many factors that militate against a forward looking approach and the building of resilience.

Behavioural and individual barriers

The way we relate to others is a key variable. **Loneliness**, for example, which so significantly impacts on health in later life, was identified as an important complicating factor in how people cope with transitions. Without the support of a partner, peers, family, friend, neighbours, individuals might find it considerably harder to face significant life changes. On the other hand, reduced **independence** might prove detrimental because it can diminish the individual's sense of control of his or her own destiny.

Individual attitudes also have an impact on resilience. For instance, individuals could capitalise on the lessons learnt from their own **past experiences** (or others') to better prepare for future difficult transitions. However, it may not be obvious how to do this and guidance and/or a certain disposition towards uncertainty might be required. Indeed, some individuals find it distressing to think in these terms, **fearing change** and thus preferring to postpone preparation indefinitely until it is too late.

For this reason, it seems important to de-traumatise transitions. To do so, it would be necessary to instigate a change in **perceptions** from one articulated around loss and hopelessness to one focused on assets that builds resilience.

Family barriers

Relations between individuals experiencing change and their nuclear/extended families are important too; while the family might provide support in instances of a difficult transition, they might also impose responsibilities on certain members (e.g. grandparents). More positively, some families are able to implement wealth-management strategies that can 'cushion' personal or family hardship in the case of a difficult transition, which arguably diminishes the potential negative impact of change. This suggests that looking at the whole family, rather than simply focusing on the individual going through change, might generate more effective responses.

Societal barriers

Expectations in terms of *gender roles*, for instance, might impose a caring role on women, limiting their capacity to control a transition. Negative views on later life can erode a person's sense of self-worth and hinder the capacity of people transitioning into retirement to engage in other activities. Another example relates to our views of *professionalism*, usually perceived as a linear trajectory into positions higher up the hierarchy; this assumption imposes pressures on older adults by negatively portraying other options such as job downsizing, re-skilling or undertaking new endeavours such as volunteering.

Taking into account that a difficult transition can imply temporary or permanent costs for an individual, **socio-economic status** is a significant factor. Indeed, the ability of an individual to cope with a diminished income, for example, on retirement, will depend on alternative sources of income or asset-ownership. In other cases, retirement will mean a reduction of expenses, which for low-income individuals might lead to a considerable reduction in their living standards and/or reliance on public services.

Finally, the lack of **flexibility of public services** is a significant barrier. Currently focused on firefighting, there may be little potential to embed a preventative approach in the public sector, regardless of the demonstrated cost-effectiveness of early action.

A repertoire of potential interventions

There appears to be little academic literature examining later life transitions. However, a **literature review** summarising the research that is available would have the potential to clarify terms, identify significant gaps where work is needed and potentially move this field of research forward. There is also an opportunity to learn from existing work on transitions into adulthood.

A **community of practice or learning community** might also be established to consider the question of transitions. This might encourage collaboration, facilitate the exchange of ideas and next practice and share resources and tools; collectively advance understanding and capabilities. The outcomes of this work might be new models of intervention for piloting or the creation of a more robust evidence base from which to influence policy as well as practice.

One of the obstacles identified with regard to individuals building their resilience is behaviours or perceptions that result from dominant ideas of what is 'normal', deriving from our prevailing way of characterising issues. Tackling this requires us not only to exert pressure on decision-makers to adapt policy to reality, but also to find ways to **influence** how difficult transitions are generally described/characterised.

Moreover, there is a need to influence **public services** that could make a difference in the lives of those dealing with difficult transitions. Engaging with public services to encourage them to take prevention seriously could have significant impact, though this would be an ambitious goal.

There may be opportunities to work with the **private sector** who are increasingly engaged because of a rapidly ageing workforce and customer base. Drawing on the resources, skills and goodwill within **communities** could also create more immediate impact in the lives of people experiencing change.

Indeed influencing work might be better aimed at the public and corporates, rather than policy makers in the present climate.

Views differed as to whether it would be better to focus on one or two transitions (retirement, becoming a carer, suddenly requiring care and bereavement were most commonly mentioned). Perhaps looking across the life-course at how we manage transitions in and out of work/care/relationships would be more valuable, as it might be possible to do something unique by looking across different issues.

It might also be helpful to focus on **early stage support** for new ventures - supporting R&D, seed-funding and setting up new partnerships (e.g. the Campaign to End Loneliness) funding a few and then selecting and promoting the best. Fewer foundations are now investing in early stage, higher risk ventures of this sort.

Or, **resilience-building projects** might be supported. In particular, projects focusing on increasing the risk-assessment capacities of the socioeconomically challenged/marginalised or working with peer-support schemes either to increase their scale or maximise their impact.