A LOCAL COMMUNITY RETIREMENT PROGRAMME: A TOOLKIT

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Welcome

Welcome to this toolkit which is designed to help you set up and run a local community-based retirement programme. We hope that this programme helps people develop and strengthen connections with their local community, meet new people and have some time and space to talk about retirement.

How and why was this toolkit developed?

In 2015 a community research group was formed as part of a collaboration between BS3 Community Development and the University of Bristol who were working together on the Productive Margins: Regulating *for* Engagement research programme. The community research group wanted to understand more about the loneliness of older people in their local community and think about how they could make things better. The group carried out research including interviews with older people and a focus group with people who worked with older people. They then wrote up their findings and recommendations in a report, an academic paper and also wrote and performed a theatre piece based on their findings *(see sources of information at the end of this guide).* The members of the research group continued to work together after the project ended; they have expanded their numbers and formed an action committee called LILAC (Local Isolation & Loneliness Action Committee) to apply the original research recommendations; one of these was a community retirement programme.

Retirement was talked about a lot by those who took part in the initial research into loneliness, people talked about it being both a time of vulnerability as well as a time of opportunity. The connections people had within their local community became more important to them and their happiness in the years after they left work. For some knowing how to make new connections and where to find out about local groups and activities was described as essential to a happy retirement and ageing well. This made us think about how the transition to retirement could be supported within communities and we thought that developing a retirement programme in the local community would be a good idea. In 2018 we received funding (from the Economic Social Research Council) to explore this and we ran a trial programme to test out our ideas. This guide is based on the learning from the trial run.

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Principles

We don't want to be prescriptive about this programme, in fact we welcome your thoughts and ideas (please see our contact details at the end of the guide). We do ask that this programme is delivered not for profit and that you provide an open, respectful and confidential space. We ask that sessions are delivered without leading participants towards one set idea of retirement but rather are open forums to consider different ways of viewing retirement.

Setting up a Community Retirement Programme

The main things to consider when setting up a community retirement programme are:

(a) Facilitation (b) Participants (c) Recruitment (d) Venue and (e) Timings.

Facilitation: The facilitator/s recruit participants, manage the programme and design and deliver sessions. Some organisational ability helps as does an understanding and commitment to ethical ways of working. Facilitators will need to be enthusiastic and good communicators who like talking to, and listening to, people and engage well with lots of different people. They need to be empathetic but also able to establish boundaries. Our experience was that some participants shared quite a lot whilst others preferred not to, it is important to allow people to share, but essential to reassure people that they don't have to. Facilitators can be volunteers or paid workers-this depends on your budget. Feedback from the trial suggests having two facilitators works well and was valued.

Participants: Our trial run suggests that this programme is of most interest to people recently retired who have had time and space to start to think about what they want retirement to look like for them. A lot of those who took part told us that they needed a bit of time after retiring before they were really ready to think about 'what's next'. However, it may also be of interest to people in the process of lessening their work hours or maybe people retired a little longer, but have moved into the community post retirement. It's useful to have a range of people in the room and not be overly prescriptive.

Recruitment: We advise recruiting people and advertising the programme about a month to six weeks before you plan to start. Recruitment can be challenging, people about to retire or recently retired are not always an easy group to find. We suggest flyers in local cafes/pubs and venues like libraries, tourist offices, community centres and citizens advice bureaus, adverts in newsletters and free local magazines and posting on social media as well as getting out and about and talking to people. We set up a stall on the street and engaged with people passing by on a busy high street on a

Saturday afternoon: this was by far our most successful way of recruiting people. Also, do use contacts and networks; we recruited a number of people from a local choir that one of our facilitators attended. We suggest working with 8-12 people on a programme.

Venue: It is important that the venue is a comfortable, private and relaxing space. We suggest making sure that you have enough space to engage in activities, talk in pairs and then come together as a whole group. We cannot stress the importance of tea, coffee, cakes and biscuits enough! We also suggest you consider the accessibility and convenience of the location-is it on a good bus route, is there parking etc? In addition, we would highlight the importance of holding sessions in a space where people can easily move on to have a drink, lunch, dinner or a coffee after the sessions for instance a room above/next to a pub or coffee shop or a community centre with an open café.

Timing: We suggest a series of 6 weekly sessions. We held our first session as an extended session on a Saturday (from 11am-3pm) with a lunch provided and then met for five Wednesday evenings between 6-8pm, however this can be changed to suit you and your participants. Having a longer first session is advised but the day and time is up to you, feedback from participants has been varied, some have said they would prefer weekends, others evenings and others daytimes. You will have people attending who prefer the time you have chosen so it's worth thinking about who can attend when-for instance if people are still in work then evenings may be easier. With the exception of the first session 2 hours is a good amount of time to meet. It is also worth thinking about the time of the year the programme runs, it might be good to start in January and/or September and take advantage of those times of year when people are feeling nudged into trying something new or are thinking about new beginnings.

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The sessions

The following pages are designed to be used as a guide and starting point. This is not designed to be a rigid programme with set topics and sessions. In fact, the idea of this programme is that the first session is used to develop the remaining sessions and set the agenda collaboratively with those attending. To help you develop your programme we have provided a detailed account of our first session and then outlines of the subsequent sessions we ran as examples. We suggest that people are provided with tea, coffee and whatever snacks your budget allows for, we provided lunch at our first session and a cold buffet at the start of evening sessions. Feedback suggested this was important and valued.

Our suggested programme looks like this:

Session	**Aims and structure**
1	Extended Saturday session lasting 4 hours with lunch. The aim is to get to know one another and develop course themes through facilitated activities
2-4	These 3 sessions are based on the themes that come out of session 1
5	External speaker/s invited to discuss opportunities in the area, followed by consideration of the content of the final session
6	First half: cover topic decided in previous session Second half: reflection and feedback
Our experience suggests that participants might appreciate the chance to meet up again a little after the programme finishes-this could be a lunch or coffee in a local café 1 or 2 months after the final session.	

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Session 1

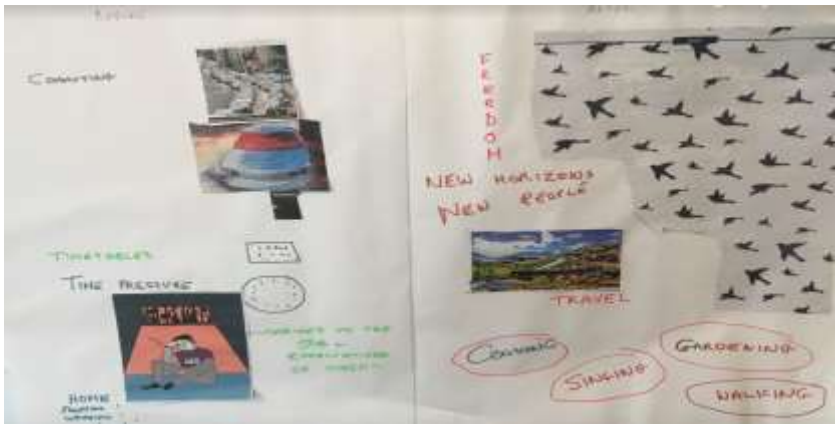
The first session is designed to be 4 hours long and aims to introduce the programme and facilitators and support participants to get to know one another. The aim is to explore the transition from work to retirement in order to collaboratively develop themes for the course.

On arrival participants should be offered tea and coffee and asked to write their name on a label and walk around the room and talk to one another. The group should then be brought together, and the facilitator/s introduce themselves and give an overview of the session and programme.

At this point we suggest that is important to discuss ground rules with participants and develop an agreed ethical framework and come back to this regularly. Within this it is essential that confidentiality is discussed; in a community setting people know one another and are recognizable to others. The programme should be a space where people can be open and honest and expect anything they say to stay in the room. The exception to this must be if facilitators are concerned for someone's safety, it is important to explain that should this occur the facilitator/s will pass concerns on to a relevant authority. It is also important to be clear that this is not a counselling service and that people are provided with avenues for support if needed.

The first activity explores '*life before and after retirement*'. In this activity participants are asked to take a sheet of A3 paper, draw a line down the middle and on one half of the page represent '*life before retirement'* and on the other '*life after retirement'*. This could be in words, drawings or pictures cut out from magazines (see example below). Participants are then asked to share and discuss their work; the facilitators ask questions and prompt participants to consider the examples they had chosen and to reflect on the difference between the two halves of the piece of paper. This should be followed by lunch and a continuing discussion of the first activity.

Before Retirement ***After Retirement***



In the second activity participants are asked to divide into pairs and complete an A3 sheet reflecting on each other's experiences and expectations of retirement, there should be four boxes to complete as in the example below:

Advantages	*Drawbacks*
Hopes	*Concerns*

One person talks while their partner scribes, asks questions and clarifies answers and then the pair swap over roles. Four large pieces of paper (maybe A1) are then placed on the wall, each corresponding to 1 of the 4 headings on the grid and participants are asked to write individual points from their grid onto a post-it note and share on the corresponding paper on the wall. The group are then asked to work together in small groups to pull the post-it notes together into themes in each category.

Following this, the facilitator/s discuss and define the themes with the group and come up with a plan for future sessions. It may be clear at this point exactly what subsequent themes will be or it maybe they are broadly defined and refined by facilitators after the session. Participants fed back to us that they would have valued having an idea of the topics to be covered in the remaining sessions before the second session. We therefore suggest that following the first session the facilitators share a rough outline of topics to be covered in sessions 2-4 with the group.

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Sessions 2-4

In our trial run the three themes that were very clear from the activity in session 1 were *Relationships, Health* and *Purpose*. Session plans for these topics are provided here to illustrate how we structured and delivered sessions. Feedback from participants suggested that other key areas to cover might include:

- Finance issues: especially if people are pre-retirement
- Looking for work: part time and/or voluntary
- Homes: pros and cons of moving/staying (downsizing, retirement flats etc)
- Advice re things that you don't know are going to change like travel insurance for older people as well as benefits and savings and services for older people
- Caring responsibilities (inc. partners, parents, children and grandchildren)

Relationships	
Aims: To explore and think about the different relationships we have and whether these do/need to change as we retire	
Time	**Content**
6pm	Introduction to today's topic and recap of last session, ask for any thoughts or reflections since last week.
6.15	Facilitated group discussion: Relationships: what does that word mean to you? Facilitator captures ideas and thoughts on a flip chart, encourage people to think broadly, not just intimate partner/immediate family but any relationships.
6.45	Move on to how/does the stage of your life affect the relationships we've written up on the flip chart? Group discussion.
7.15	In pairs consider whether there are any relationships you'd like to change or think might change (for yourself or others)? Be prepared to feedback 1 or 2 thoughts.

	Sharing of last discussion in pairs with wider group.
7.45	Facilitator sums up session.

Health in retirement (physical, mental and emotional)	
Aims: To explore individual concerns and identify ways to live healthily	
Time	**Activity**
6pm	Introduction to today's topic and recap of last session, ask for any thoughts or reflections since last week.
6.15	Facilitator discusses what we might mean by 'health' highlights that in this context we're thinking of health in terms of the physical, mental and the emotional (NB our group also suggested this should include spiritual).
6.30	Participants divide into groups of 3 and each person takes a turn to discuss a health-related concern this could be one they are experiencing or a potential concern in the future and could relate to themselves or another person.
6.50	The group are asked, "Bearing in mind the conversations that have just taken place-what is wellbeing?" Facilitator uses flip chart paper to start to develop a group definition, or thoughts about essential ingredients of wellbeing in retirement.
7.20	In pairs (10 mins each) identify something you could change regarding your general wellbeing and think about what steps you might take to change that (group are told this is for themselves and won't be shared).
7.40	Group are asked: What do you do now that is good for your wellbeing? Large piece of paper is provided, and all asked to write answers on a post-it note and share-list is later collated and shared with the group at the next session.

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Purpose	
Aims: To consider purpose and changes in purpose in retirement	
Time	**Content**
6.00	Introduction to today's topic and recap of last session, ask for any thoughts or reflections since last week.
6.15	What is 'purpose'? This term was used a lot in exercises in the first session-what do you think we mean by that? What words come into your head that you would you associate with the idea of purpose in life? Facilitator to lead and write words on flip chart.
6.30	In pairs: What gives you a sense of purpose in your life now? Split into pairs, talk to other person about things that come to mind. Ask people to be prepared to feedback 1 or 2 points. Facilitator gets feedback and group discusses answers
7.00	Facilitator asks the group to think about what they have done well in their work and/or personal life and what skills did they need to be able to do that? Participants walk around room talk to everyone-tell them a different skill each time. Facilitator brings people back together-asks for thoughts on this exercise.
7.15	In pairs: What is the one thing that you would wish to experience or accomplish? Imagine that you have the wherewithal and freedom to do that.
7.30	Facilitated discussion: Who heard something they didn't expect to hear? Who said something they didn't expect to say?

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Session 5

This session draws on the activities in the first four sessions. The idea is for the facilitator/s to reflect on conversations and activities as the programme goes along and invite a few people in to talk to the group about things in the local area that they believe might be particularly relevant. So for instance if several people are interested in local courses you may invite in a local adult education provider. If people discuss sports and exercise you might invite someone from the local gym. If people talk about volunteering, you might want to invite in a volunteer coordinator from a local group or charity. If people have discussed wanting to find a part time job you might want to invite in a local business or employment advisor. The idea here is to build on the groups' interests and be a bit imaginative. Ideally invite 3-4 people and ask them to speak for 15 mins each maximum and allow for questions and discussions.

The aim of the remainder of the session is to decide on the content of the final session. At this point all participants should be given a copy of their combined answers from the *advantages, disadvantages, hopes* and *concerns* activity that they did in session 1 (see below). Using this as a prompt the group discuss what they would like to explore in the final session.

Advantages	**drawbacks**
Freedom; more time for things I like	Loss of structure and purpose
Contentment, live in the moment	Money-income dropping
Money-things are cheaper	Loneliness
Hopes	**Concerns**
Learn new skills and make new friends	lower physical and mental wellbeing
Family-closer links and time for people	Serious illness and dementia (self or others)
To stay healthy	Keeping financial assets
Travel	Having enough money to live on

Session 6

The aim is to spend the first hour/hour-and-a-half of the session covering the topic decided upon in session 5. In the second half of the session the facilitator/s place the A3 sheets made in session 1; 'life before and after retirement' around the room and people are asked to have a look at theirs and others' and come back together and reflect on if/how the programme has changed their thoughts on retirement. Following this, participants are asked for general feedback regarding the programme.

It may be good to suggest meeting up for one last time in a month or 2 in a local café-several of the group we worked with suggested this.

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A note on Evaluation

As our trial run was part of a research project we asked participants to complete a form about their expectations of the programme at the first session and then gave out and collected in weekly evaluation forms at the end of sessions. These proved useful to the facilitators in planning sessions and thinking about next steps, example forms are provided on the following pages.

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Expectations: Community Retirement Programme

When did or do you expect to retire?

How did you hear about this project?

Why did you decide to come along?

What do you hope to get out of these sessions?

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Evaluation form: Community Retirement Programme

	Strongly disagree	**Disagree**	**Unsure**	**Agree**	**Strongly agree**
	0	**1**	**2**	**3**	**4**
The session met my expectations.					
The content was helpful.					
The level of the session was appropriate.					
The session was enjoyable.					
The session was worth my time.					
The length of the seminar was appropriate.					
I would recommend the session to my friends					

What have you gained from coming to the session today?

What did you like **the most**?

What did you like **the least**?

What changes should be made to improve this session?

If you have any other comments or thoughts please complete the reverse of this form…

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Sources of Information

Research report and information about Productive Margins and Alonely:

www.productivemargins.blogs.bristol.ac.uk/projects/Isolation-and-loneliness

Academic Paper:

Barke, J. (2017) Community-based research and approaches to loneliness prevention, Working with Older People, Vol. 21 Issue: 2, pp.115-123 https://doi.org/10.1108/WWOP-10-2016-0032

Policy Briefing:

Barke, J., Crawford, B., Manchester, H., McDermont, M., Duggan, J., Green, R., Hankins, S., Franks, S., Jubb, C., Nye, A., Pickford, A., (2018) Loneliness and social isolation: the need for community-led action, (Policy Briefing 58) www.bristol.ac.uk/policybristol/policy-briefings/loneliness-and-social-isolation/

BS3 Community development and LILAC:

https://bs3community.org.uk

For more information please contact:

- Ruth Green at BS3 Community Development:
- LILAC: ADD LILAC EMAIL ADDRESS HERE
- Jenny Barke or Helen Manchester at the University of Bristol: Jenny.Barke@bristol.ac.uk and Helen.Manchester@Bristol.ac.uk