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Retirement: to survive or to adapt? Validation of the rationale of an intervention program

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Abstract

Objective

This study presents the results of an internal validation of a successful transition and adaptation preparation for a post-career career program for senior adults.

Method

A total of 10 judges, with in-depth knowledge in the field of vocational guidance and career development, were asked to decide about the congruence between a set of activities and the dimensions and the development tasks that constitute the rationale of the program.

Results

Out of the total of 11 activities that make up the core of the program, eight were unanimously considered to be adequate for the intervention's objectives, that is, in direct relation to the theoretical rationale, namely the dimensions and relevant development tasks.

Conclusion

The results obtained demonstrate a good acceptance of the program by the judges to whom it was presented.

Keywords: Program; retirement; Validation study.

The developmental literature has indicated that the transition to retirement is an event that takes place in an adult's life, around the age of 65, and in which the person significantly (abruptly or progressively) abandons the role of worker, due to being close to his/her "end of life". At the same time, these adults seek to reconcile with the past, often engaging more actively in other life roles (Bühler, 1964; Erikson, 1959; Greenhaus et al., 2010; Havighurst, 1953; Levinson, 1986; Peck, 1956; Super, 1980). Although these theoretical developmental models (e.g., Bühler's Life Course Theory; Erikson's Psychosocial Development Theory; Super Career Development Model) are quite useful in contextualizing the characteristics, challenges and development tasks of this particular phase of aging, they do not reflect the current configurations of life/career trajectories of people over 65 years of age (Pinto, 2021).

Currently, a long post-retirement period is expected, as a result of the increase in average life expectancy and the change in health, housing, social and economic conditions. In the European Union of 27 countries, in 2018, the resident population

aged 65 or over corresponded to 20.1% of the total population. In Portugal, statistics indicate that, in the same year, about 21.7% of the population was elderly, with countries such as Germany, Bulgaria, Finland, Italy and Greece being in a similar situation. These new conditions make the transition to retirement a significant milestone in adult life; during the retirement period a large number of people continue to be involved in productive activities (of a formal or non-formal nature), which have an impact on their levels of physical, psychological and social well-being (Fonseca, 2011; Lee et al., 2020; Lippke & Cihlar, 2021; Rodríguez-Monforte et al., 2020; Vidovičová, 2018; Wanka, 2020), while enabling them to respond to the needs of the community in which they live. When reviewing the activity rate of this group, the data indicate that, in the European Union, about 5.4% of that population is still working, thus holding an active position in society. In Portugal, the data indicate that the working retiree population is more than double, 11.5%. And, although some people's condition stem from economic necessity, a recent study carried out by the Eurofound agency indicates that more than half of those individuals who remain active are so because they feel capable, they enjoy what they do, or intend to "feel useful"; by the same token they also cope with loneliness and social isolation (Eurofound, 2019). The new forms of transition to a post-career career should promote those adults' active citizenship and social inclusion, even if they demand an adjustment and adaptation effort, in order to ensure a successful transition (Cohen-Mansfield & Regev, 2018).

However, the more or less successful way in which people go through this stage of life depends on their ability to put into practice the attitudes, behaviors and skills necessary for coping with a set of tasks and challenges peculiar of this phase of life. A large proportion of people transitioning to a post-career career anticipate that this will translate into a negative change considering their current life circumstances, which would lead to a set of losses (e.g., in the sense of identity, meaning and usefulness; Barros de Oliveira, 2008; Ferreira, 2008; Mooney et al., 2021). It is therefore necessary to develop initiatives that facilitate the transition to formal retirement, supporting the idea of valuing this new stage of adult development and also social sustainability itself.

At this stage of life career management support programs constitute a valuable resource to promote the sense of empowerment of those adults, providing them with a set of tools that make them more apt to effectively manage this period of transition and adaptation to a post-retirement life (Greenhaus et al., 2010; Leandro-França et al., 2016; Peterson & Murphy, 2010; Pinto, 2019). These programs, essentially preventive and developmental, have adopted either a more restricted or more comprehensive perspective of retirement (Hershey et al., 2003) focusing different topics, such as health, home setting, finance, leisure and social relationships (Beehr & Bowling, 2002), and have achieved mostly positive results, with regard to a set of cognitive, motivational and behavioral changes following retirement (Ogunbameru & Sola, 2008; Pazzim & Marin, 2018). However, it is a resource that has scarcely been made available to those adults, contrary to the basic principle that career interventions should be provided at any stage of the life cycle, including during the transition to retirement (Rodríguez-Monforte et al., 2020). For example, in a recent article, Leandro-França et al. (2016) identified only eleven scientific articles, published in English, Portuguese or Spanish, between 1975 and 2014, focusing on the presentation of intervention programs to support the transition to retirement. Only four of those papers had a solid theoretical rationale in their conceptualization.

In this connection the need to deepen the understanding of the transition to this new phase of life is highlighted, with the aim of contributing to an expansion and updating of theoretical models that can serve as a rationale for the development of intervention programs, from the conceptualization of new (sub)stages of career development in adulthood. It is also important to invest

in the development of more support programs for this stage of life that, based on the aforementioned theoretical frameworks, help those adults to solve a set of developmental tasks, such as exploring new interests and competences, the reassessment of life values, the analysis of attitudes, needs and fears regarding this stage of life, the identification and acknowledgment of support resources, among others.

In this connection, based on what has been mentioned, Pinto and Rebelo-Pinto (2020) developed the program “Retirement: Surviving or Adapting?! A Transition Support Program”. The proposed intervention program fits into the post-career career concept, which consists of a development phase that occurs after formal retirement of a job/continued work (Pinto, 2021). This period requires involvement in a set of developmental tasks organized into three dimensions, namely Identity, Opportunity and Adaptation. Both the dimensions and the proposed tasks resulted from the review of the main developmental theoretical models (Bühler, 1964; Erikson, 1959; Greenhaus et al., 2010; Havighurst, 1953; Levinson, 1986; Peck, 1956; Super, 1980) as they are considered to best support a comprehensive and integrative approach to this particular phase of the life cycle (Fonseca, 2021; Pinto, 2021).

The Identity dimension encompasses a set of developmental tasks through which participants engage in rebuilding their sense of self, usefulness and self-esteem. In this connection, people are encouraged to explore information about themselves, their past and present, their characteristics, interests, skills, values and attitudes, in order to develop a more enlightened sense about themselves (Bühler, 1964; Erikson, 1959; Havighurst, 1953; Levinson, 1986; Peck, 1956). The Opportunity dimension encompasses a set of developmental tasks through which participants engage in active exploration of the environment, new activities, resources and relationships. In this connection, people are encouraged to proactively explore information about their current retirement situation, the setting in which they live, the opportunities to create or maintain the lifestyle they desire regarding personal, family, social, economic, leisure and community terms, and the resources needed to achieve that lifestyle (Bühler, 1964; Havighurst, 1953). And, the Adaptation dimension encompasses the developmental tasks through which participants engage in planning, decision-making, and in the development of an optimized and future-oriented attitude. Thus, people are encouraged to set goals for their future, define and implement action plans that increase the probability of achieving the goals, and assess their situation in terms of levels of well-being and satisfaction with their new phase of life (Bühler, 1964; Greenhaus et al., 2010; Levinson, 1986; Peck, 1956; Pinto, 2010; Super, 1980).

This study aims to validate this theoretical rationale, underlying the intervention program “Retirement: Survive or Adapt?! A Transition Support Program”. For this purpose, support was requested from a group of judges, experts in the area of the construct under assessment, who decided about the congruence between the previously mentioned dimensions and the development tasks and a set of activities specifically designed by the authors of the program to favor the transition and adaptation processes to a post-career career for senior adults.

Method

Participants

A total of 10 participants were part of the group of judges. They had in-depth knowledge in the field of vocational guidance and career development. In this group, six have a PhD in Psychology with a major in Vocational Psychology, and two have a Master’s degree in Psychology, with several years professional experience and research in this field ($M = 8.2$; $SD = 4.24$; Min-Max = 2-12). The remaining two judges are second-year master’s degree candidates who have two credit units of contents associated with vocational psychology and career development.

The program on which this work is based is called “Retirement: Surviving or Adapting? A Transition Support Program”. This program aims to prepare for successful transition and adjustment to a senior-adult post career period. It is a program aimed at people aged 55 or over who, regardless of their level of education and profession, have retired (or will retire) from their professional activity, but maintain health and autonomy conditions that allow them to pursue an active role in society during the post-career career period. The program is organized based on 8 sessions (sessions 1 to 8) attended by small groups (from 10 to 12 participants), on a weekly basis; each session lasts 1h30, and a follow-up session takes place two months after completion of the program (Table 1). Session 1 is intended for the presentation of the program and review of the participants’ levels of well-being in connection with their stage of development. Sessions 2 to 7 are organized according to the three aforementioned dimensions (Identity, Opportunity and Adaptation). They involve a set of activities related to the development tasks identified for each of those dimensions of the post-career career phase. Session 8 is intended for program completion activities, including the review of the materials produced by the participants and the discussion around the most relevant lessons learned. Session 9 is a follow-up session aimed at monitoring the participants’ life projects that resulted from the program’s activities. The program further provides for an evaluation scheme. Sessions 1, 8 and 9 include the use of instruments to assess post-career career task-solving styles, and participants’ resilience and well-being levels, as a means of evaluating results. And, sessions 3, 5 and 7 include the use of an instrument to assess the participants’ reactions to the psychoeducational intervention process. The program has specific materials prepared by its authors. These materials are photocopied to form a brief career portfolio for each participant.

Table 1*Retirement - survive or adapt? A transition support program: intervention framework*

Session	Dimension	Objective	Development tasks	Activities
1	Identity	Pre-test administration	-	- Post-Career Career: Coping Styles - Resilience Scale - Subjective Well-Being Scale
1		Presentation	-	1: Bingo!
2		Rebuilding a sense of identity, usefulness and self-esteem	- Re-evaluate oneself	2: Citizen's Card
2			- Reassess his/her trajectory/life story	3: Road of Life
3			- Recognize and explore new interests and skills	4: Futuristic Curriculum
3			- Re-evaluate life values	5: PPR: Cash Values
4	Opportunity	Proactively explore activities, resources and relationships	- Review expectations, beliefs, and myths about retirement and review attitudes, needs and fears regarding this new phase of life	6: Wailing Wall
4			- Identify and recognize resources	7: I think you should
5			- Identify and explore possibilities for paid work, volunteer work and new leisure activities, and/or re-entry into the education system;	8: Activities Fair
5			- Develop warm and affectionate relationships with others	9: Relational Thermometer
6	Adaptation	Develop an optimized and future-oriented attitude	- Set goals and develop action plans	10: GPS: Part I
6			- Monitor the implementation of transition and adaptation to retirement plan	10: GPS: Part II
7			- Reorganize / reconfigure the life project	11: Launching Ramp
7			- Promote levels of resilience, well-being and satisfaction with this new phase of life	
8		Conclusion	-	12: WhatsApp message
8		Post-test management	-	- Post-Career Career: Coping Styles - Resilience Scale - Subjective Well-Being Scale
9		Follow-up management	-	- Post-Career Career: Coping Styles - Resilience Scale - Subjective Well-Being Scale

Procedures

The group of expert judges was invited to participate in this investigation by email that informed the objectives of the request for collaboration and had also two documents attached. The first one presented the post-career career concept and its theoretical rationale based on three dimensions and 12 developmental tasks. The second document presented a description of each of the 11 activities of the intervention program (Table 2). The judges had to associate each program activity to the dimension (Identity, Opportunity or Adaptation) and to the relevant developmental task. The activities were presented to the judges at random. It was not mentioned how many activities there were in the program associated with each dimension or task. This study was approved by the Catholic Research Center for Psychological, Family and Social Wellbeing of the Universidade Católica Portuguesa, complying with all ethical requirements. In this connection, all participants were duly informed about the ethical issues of this investigation, namely the data anonymity and confidentiality and the possibility of choosing not to participate in the study.

Table 2
Intervention program activities: description provided to judges

Activities	Descriptive
1: Bingo!	-
2: Citizen's Card	<ul style="list-style-type: none"> - Use activity card - Spread cards with personality traits - more or less positive - Participants to review all available features and, in turn, each one takes a card and gives his/her opinion on the meaning and/or importance of the feature of that card - Each participant selects, among the available characteristics, the ones he/she considers that best characterize him/her - Participants will have their "citizen's card" filled in with the characteristics with which they identify themselves
3: Road of Life	<ul style="list-style-type: none"> - Use activity sheet; the road as a metaphor for the idea of life - Use "signposts" to represent the most striking moments (either positive or negative) - On the upper side of the road indicate the positive events (rectangular signs) and on the lower side indicate the negative events (triangular signs) - Next to each event, indicate what helped (trees) but also obstacles encountered (stumbling blocks) - Next to each event, reflect on the main learning developed and that they intend to keep with them during this new phase of life (treasure chests)
4: Futuristic Curriculum	<p>Part I:</p> <ul style="list-style-type: none"> - Use activity card related to the CV of the past: encourage reflection on the academic degrees obtained, including training, professional experience, and organizational/management, communication, and personal skills <p>Part II:</p> <ul style="list-style-type: none"> - Review interests and skills, by completing a questionnaire organized in four separate steps: (i) identify all professions and functions performed, (ii) review interests and skills, (iii) identify a profile of interests, activities, skills and contexts best suited to the characteristics of each participant, (iv) encourage participants to reflect on the results obtained <p>Part III:</p> <ul style="list-style-type: none"> - Making a CV regarding their future, by developing occupational goals for their future and identifying possible education/training opportunities, professional opportunities, and skills (which they may already have or need to develop) that will be crucial to achieve the objectives
5: PPR: Cash Values	<ul style="list-style-type: none"> - Explain the concept of life values and present the table with the Grace and Brown (1996) list of values - Select, from the list presented, three life values associated with each life role - Stimulate sharing with the group what values they most associate with each role - Answer four questions regarding their priority life values - Make a list with the most important values and a list with the least important values - Reflect on how they want their most important values to be reflected in their future
6: Wailing Wall	<ul style="list-style-type: none"> - Introduce the "wailing wall" which can be a wall or blank board - Distribute post-its to write concerns and anxieties regarding this stage of life and stick them on the "wall" - Request ideas to organize the different contributions by theme (e.g., expectations, fears, myths and fears in relation to the family, in relation to living conditions, in relation to health...)
7: I think you should	<ul style="list-style-type: none"> - Use the themes defined in the Wailing Wall Activity, assigning each pair of participants a theme - Use the different ideas contained in this theme and propose solutions to expectations, beliefs, or myths about retirement - Create a story, with a character who presents the aforementioned problems, and who goes through several challenges, and contacting people or entities, until culminating in the resolution of the challenges - The story must be developed in the form of a comic strip; alternatively, participants can choose to perform a role-play
8: Activities Fair	<ul style="list-style-type: none"> - Stimulate brainstorming about all kinds of activities that can be done during the retirement period - Distribute a set of cards with "coins" - related to time (hours or minutes) that totals 24 hours - Distribute the activity card, with different categories that can be organizers of these activities (for example, to earn money, to help the family) - Participants must use their time cards (exchange currency) in order to "buy" activities they would like to spend their time upon their retirement - Select at least one activity in at least four of the categories identified

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Table 2*Intervention program activities: description provided to judges*

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Activities	Descriptive
9: Relational Thermometer	<ul style="list-style-type: none"> - Use an activity card. Each page deals with a particular relational group – family relationships, friendships and other acquaintances - For each relational group, select three people and write their name in the relevant blanks - Assess the quality of your relationship with each of these people, from a distant/indifferent relationship to a warm relationship - Indicate the people with whom they have the best and worst relationships and review the reasons for this - Anticipate strategies to promote tolerance, forgiveness, resilience and self-help that can be useful in improving the quality of their relationships
10: GPS: Part I	<ul style="list-style-type: none"> - Use the results of the “Activities Fair” activity - ask participants to retrieve all the activities they intended to develop - Select four that will represent the objectives to be achieved - For each activity specify what they propose to achieve (goal to achieve) - Share in group
10: GPS: Part II	<ul style="list-style-type: none"> - Use the metaphor of a roundabout and define, for each of the previous objectives (each of the exits of the roundabout), (i) the main steps or steps necessary to achieve in order to achieve the objectives, (ii) the time period for the implementation of each step or stage, (iii) the possible obstacles that may interfere with the achievement of the objective, and (iv) the personal and social resources that may favor its attainment of the objective
11: Launching Ramp	<ul style="list-style-type: none"> - Stimulate an analysis of their personal career portfolio – review of all activities carried out and main conclusions associated with each one - Use the activity card to reflect on their experience in the program, in particular on what they learned about the way they intend to redefine/reconfigure their life project; questions: (i) what do I get from these sessions; (ii) what I liked/valued the most; (iii) What doubts remain; (iv) And now? and, (v) my life motto from now on
12: WhatsApp message	-

Data Analysis

The following characteristics were taken into account, in order to ensure that those independent judges arrived at similar conclusions: (i) awareness of the research hypothesis (Almeida & Freire, 2003) (ii) development dimensions and tasks well-defined, exhaustive and mutually exclusive (Almeida & Freire, 2003); and, (iii) independence and non-contact between observers (Almeida & Freire, 2003). It was considered that the percentage of agreement between judges should be equal to or greater than 80% (according to the following formula: $% A = [Na/(Na+Nd)]^2 \times 100$ (Almeida & Freire, 2003; Pasquali, 2011) for the maintenance of activity in the program.

Results

Table 3 presents the results of the judges' evaluation for each of the activities of the Retirement Program: Surviving or Adapting?!. Specifically, the activities and their respective dimensions and development tasks are indicated, as well as the rates of agreement of the judges in relation to this organization.

The Table 3 shows the existence of total agreement (100%) among the judges in eight activities regarding the belonging dimension, and in seven activities regarding the belonging development task. The activities that the judges most disagreed upon were: activity 4 “Futuristic curriculum”, activity 7 “I think you should”, and activity 8 “Activities fair”. In the case of activity 7, which belongs to the “Opportunity” dimension, one of the judges attributes it to the “Adaptation” dimension. Out of all the other judges who agreed with the activity, one of them considered that the associated developmental task would be “to review expectations, beliefs, and myths about retirement and to assess attitudes, needs and fears in relation to this new phase of life”. In the case of activity 8, which also belongs to the “Opportunity” dimension, one of the judges assigned it to the “Identity” dimension and to the development task “to recognize and explore new interests and skills”.

² Na: number of units checked simultaneously by all judges; Nd: number of units checked by some of the judges only.

Table 3*Program activities assessment by the group of judges: agreement rate*

Dimension	Development tasks related to oneself	Activities	% of Agreement Dimension	% of Agreement Task
Identity	-	1: Bingo!	-	-
	- Self re-evaluation	2: Citizen's Card	100	100
	- Reassess your trajectory/life story	3: Road of Life	100	100
	- Acknowledge and explore new interests and skills	4: Futuristic Curriculum	70	70
	- Re-evaluate life values	5: PPR: Cash Values	100	100
Opportunity	- Review expectations, beliefs, and myths about retirement and review attitudes, needs and fears regarding this new phase of life	6: Wailing Wall	100	100
	- Identify and recognize resources	7: I think you should	90	90
	- Identify and explore possibilities for paid work, volunteer work and new leisure activities, and/or re-entry into the education system	8: Activities Fair	90	90
	- Develop warm and affectionate relationships with others	9: Relational Thermometer	100	100
Adaptation	- Set goals and develop action plans	10: GPS: Part I	100	100
	- Monitor the implementation of their transition and adaptation program to retirement	10: GPS: Part II	100	90
	- Reorganize / reconfigure the life project	11: Launching Ramp	100	100
	- Promote levels of resilience, well-being and satisfaction with this new phase of life	12: WhatsApp	-	-

As for activity 4, it generated around 30% higher levels of disagreement among the judges. Although the activity was designed to work on the "Identity" dimension and the development task "to recognize and explore new interests and competences", three of the judges attributed it to the "Opportunity" dimension and to the tasks "Identify and recognize resources" and "Identify and explore possibilities for paid work, volunteering and new leisure activities, and/or re-entry into the education system". These judges indicated that they considered that the title of the activity was inappropriate, not referring to the "Identity" dimension, due to its focus in the future, instead of the past and present. They also pointed out that the description of the activity over-stimulated the participants to develop occupational goals for their future, namely through the identification of potential education/training opportunities, professional opportunities, and skills (which they may already have or need to develop) that would be crucial to achieve these objectives. It should also be noted that in activity 10 "GPS-Part II", one of the judges considered that the associated developmental task would be "to define objectives and develop action plans". Also in activity 11 "Launch ramp", despite all participants having associated it with the "Adaptation" dimension and with the development task "reorganize/reconfigure the life project", the activity was designed to also contribute to "Promote resilience levels, well-being and satisfaction with this new phase of life".

Discussion

This study presents the development of a program to support a successful transition and adaptation to a post-career career and, in particular, reviews the results of the preliminary assessment of its internal validity, based on the opinion of a group of judges about the relationship between the theoretical rationale that supports the intervention and the activities in which this intervention materializes.

The intervention program presented was developed from the assessment of a set of theoretical and empirical studies on this stage of life, namely with a focus on needs already identified and on intervention programs or strategies already developed, (e.g., their reception with the target population, their results, and their main difficulties/gaps). This process enabled the development of a frame of reference (rationale previously presented) that favored the development of an action that is intended to be contextualized and systematic, and from which decisions about objectives, activities, materials, and moments/times of action are sustained (Rojo et al., 2002; Woodward, 2002). In particular, it was intended that the activities of the program would translate into concrete actions to be carried out by the participants, with the aim of eliminating the problems or needs identified, which in this particular case correspond to the adequate resolution a set of development tasks (Rojo et al., 2002).

The results obtained demonstrate, in the first place, a good acceptance of the program by the judges to whom it was presented. Out of the total of 11 activities that make up the core of the program, eight were unanimously considered to be adequate for the intervention's objectives, that is, in direct relation to the theoretical rationale, namely the dimensions and relevant development tasks. A few judges raised questions about the remaining three activities, despite the fact that, in two of the activities (7 and 8), the criticisms made were not considered to be serious enough to call into question either the activities carried out or their association with the size and relevant development task. It is important to consider that, despite having sought a direct correspondence between the dimensions and the development tasks of the program rationale, and the objectives and contents of each activity, it is common to find in intervention programs, either several objectives that are only achieved through more than one activity, or several activities that are contributing to the achievement of the same objective (Rojo et al., 2002).

However, with regard to the activity 4 "Futuristic Curriculum", the judges had several questions, as mentioned above. In order to tackle the difficulties felt, the name of the activity was changed to "Journey to the center of the self". Initially the activity was organized in three parts: (i) preparation of the past curriculum vitae; (ii) exploration of interests and skills, by completing a brief questionnaire; and, (iii) elaboration of the curriculum vitae of the future, with the development of some occupational objectives for the future. After the judges' feedback, the activity was modified to: (i) explore interests and competencies, by completing a brief questionnaire; (ii) review their most interesting past experiences (in different life roles) and the way in which these interests and skills were present in these experiences; and, (iii) implementation of these interests and competences in the exercise of the different roles. With these changes, it is considered that the self-knowledge component of the activity is enhanced.

The main limitation of this study is that we also did not evaluate the program activities from participants of the target population, that is, future recipients of the program - adults aged 55 or over in a situation of retirement or transition to retirement. An assessment by this group could help obtain relevant information on how each activity is understood, approached and carried out, as well as the processes used, and the facilities or difficulties encountered. More specifically, some authors (Juste, 2000; Kazdin, 2010, 2011; Leandro-França, 2016; Rojo et al., 2002; Woodward, 2002) emphasize the importance of evaluating aspects such as the general attitudes of the participants towards the activities, the effectiveness and quality of the activities presented, the (cognitive) processes and strategies used in carrying out the activities, the difficulties felt, instructions (in) sufficiency, the discussions generated in the group after the completion of each activity and the time required to their realization.

Conclusion

This study aimed to review the degree of agreement of a group of judges expert in Psychology in the association between each activity of the program to the dimension and relevant development task of its theoretical rationale. In short, the intervention program showed good initial quality, with regard to its connection with the theoretical rationale that backs it, motivating the continuation of studies that allow the deepening of information about it, namely with regard to the studies to evaluate the effectiveness of the intervention. This work is based on the great value of presenting an intervention program as a tool that starts from a (re)conceptualization of this new phase of life (post-career career), enables preventive and promotional intervention with senior adults, and generates new needs for training of technicians working with this population.

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