

Experience Report

Experience report with a preparation program for the retirement of public servers

Relato de experiência com um programa de preparação para a aposentadoria de servidores públicos

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Abstract

This study aimed to report the experience of a multidisciplinary team in the implementation of a Retirement Preparation Program for municipal civil servants. It was an experience report of the implementation of a pilot project of a Retirement Preparation Program in an Own Social Security Regime of a medium-sized municipality in the interior of the State of São Paulo. The experiment was carried out in five stages: (a) Dissemination of the program; (b) Screening of participants; (c) Pre-program evaluation; (d) Development of the program and themes; and (e) Post-program evaluation. As qualifiers of the experience, quantitative and qualitative data were presented, collected from semi-open questionnaires, applied at the beginning and end of the experience, as part of the construction and improvement stages of the program. Five thematic group meetings were held with a total of 28 participants. Among the participants who reevaluated the program, 100% (n=17) qualified it as good or excellent, 94% (n=16) stated that they had clarified doubts, 71% (n=12) reported having changed their understanding of retirement and adopted new attitudes to prepare, and 82% (n=14) stated that they contributed to the preparation for retirement. There were qualitative reports on the reframing of the concept of retirement, changes in the decision to choose to benefit, and the construction of new perspectives of the future. The pilot project carried out proved to be a possible strategy for the preparation about the process of retirement and life planning, it is an eminent need to implement actions in this direction to promote the quality of life of public servants.

Keywords: Occupational Therapy, Retirement, Aging.

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Resumo

Este estudo objetivou relatar a experiência de uma equipe multidisciplinar com um Programa de Preparação para Aposentadoria destinado a servidores públicos municipais. Tratou-se de um relato de experiência da implantação de um projeto piloto de um programa de preparação para a aposentadoria em um Regime Próprio de Previdência Social de um município de médio porte do interior do Estado de São Paulo. A experiência foi realizada em cinco etapas: (a) Divulgação do programa; (b) Triagem dos participantes; (c) Avaliação pré-programa; (d) Desenvolvimento do programa e temáticas; e (e) Avaliação pós-programa. Enquanto qualificadores da experiência, foram apresentados dados quantitativos e qualitativos, coletados a partir de questionários semiabertos, aplicados no início e final da experiência, como partes das etapas de construção e aprimoramento do programa. Foram realizados cinco encontros grupais temáticos com um total de 28 participantes. Dos participantes que reavaliaram o programa, 100% (n=17) o qualificou como bom ou ótimo, 94% (n=16) afirmou ter esclarecido dúvidas, 71% (n=12) relatou ter mudado o entendimento sobre a aposentadoria e adotado novas atitudes para se preparar e 82% (n=14) apontou que as atividades contribuíram para o preparo para a nova fase. Observaram-se relatos qualitativos sobre ressignificação da aposentadoria, mudanças na decisão de optar pelo benefício e construção de novas perspectivas de futuro. O projeto piloto se mostrou uma estratégia viável para a preparação em relação ao processo de aposentadoria e planejamento de vida, sendo uma necessidade eminente a implementação de ações nesse sentido para a promoção de qualidade de vida de servidores públicos.

Palavras-chave: Terapia Ocupacional, Aposentadoria, Envelhecimento.

Introduction

The pre-retirement phase is considered a transition period, often characterized by anxieties and fears of imminent changes and the need to (re)build future projects (Alves & Alves, 2015). Some difficulties are often observed in the period before this stage of life: uncertainties about aging, doubts about the ideal age to retire, uncertainties about the financial situation, eagerness to leave work and the friendships achieved, and also the lack of planning the future (Vitorino, 2017).

The retirement experience is different for each individual and this depends on cultural, personal, socioeconomic, and contextual aspects (Wang et al., 2011). In our society, in which work is directly related to the worker's social identity (Costa & Soares, 2009) and in which there is an overvaluation of production, retirement is often seen as the loss of the meaning of life, as a kind of social death (Zanelli et al., 2010). This is a stigmatized view, in which retirement is linked to the loss of the individual's capacity for action, inactivity, unproductiveness, or passivity (Vitorino, 2017).

Depending on how the individual organizes his life after retirement, some difficulties may arise such as loss or reduction in social contacts, social isolation, financial impacts, and problems with the use of free time (Alves & Alves, 2015; Zanelli et al., 2010). Difficulties in adaptation (Witczak, 2005) and health impacts can also occur such as the high pre-eminence of psychosomatic illnesses

(França, 1999) and an increase in alcohol consumption (Kuerbis & Sacco, 2012). This can all be due to greater idle time and the absence of meaningful and pleasurable activities (Barbosa & Traesel, 2013).

When we consider the importance of human occupation in the state of health, in the organization of man and the exercise of his abilities and typical experiences of each period of life (Kielhofner et al., 1991), thinking about the interruption of work, the loss of the role of worker and changes in daily life can provide us with clues about possible impairments in health and quality of life. This is even more significant when considering the aging process, a natural process common to all, which occurs concurrently with the retirement process.

Faced with this issue, prevention and preparation for retirement are essential, aiming to promote well-being, health, and quality of life during the new phase of life (Soares et al., 2007). Before the care for the worker can be a fundamental factor for the recovery of self-esteem, construction of projects for the future, and identity, since it is common that, throughout life, the professional role stands out from the other roles of the individual (Araújo et al., 2005). With the worker's adequate preparation, organization, and planning, the gains arising from retirement can be reinforced and the impact of losses circumvented, making the transition easier (França, 2002). Thus, this individual will have more chances and opportunities to organize and plan to leave the usual job (Silva et al., 2012; Soares et al., 2007).

One of the public responses to this issue is Chapter IV, item IV-C of Law 8842 of January 4, 1994, also known as the National Policy for the Elderly Person, which provides: "To create and encourage the maintenance of retirement preparation programs in the public and private sectors with at least two years before leave" (Brasil, 1994).

Retirement Preparation Programs (RPP) can be a way to deal with this issue of transition to retirement (Antunes, 2014) and should include retirement planning, preparation for the transition from active to inactive professional life, the structuring of life after such a process, the construction of new life projects, the insertion in meaningful activities, the reorganization of family life, the construction of new social bonds, and the prevention of financial needs (Papalia & Olds, 2000). This proposal requires the performance of a team from a multidisciplinary perspective, as the complexity of the theme depends on various fields of professional activity (Antunes, 2014; Zanelli et al., 2010).

The preparation of workers for retirement is still a neglected topic in the lectures and workshops in the area (Antunes, 2014). Although studies have already pointed out the benefits of actions aimed at preparing for retirement in terms of promoting well-being, health, and quality of life, they present practices concentrated in a few public (Murta et al., 2014; França et al., 2014; Costa & Soares, 2009). Experiences in the Brazilian social security sector are scarce (Soares et al., 2007) and studies that sought to assess existing programs are also restricted (Murta et al., 2014; Nunes, 2014).

This study aimed to report the experience of a multidisciplinary team with a Retirement Preparation Program for municipal public servers.

Method

This is an experience report of the implementation of an RPP pilot project aimed at municipal public servers, candidates for the retirement process in a Private Social Security System (PSSS) in a medium-sized municipality in the interior of the state of São Paulo, whose average population is between 400,000 and 500,000 inhabitants. The PSSS in this study is a municipal authority responsible for managing social security benefits for statutory public servers in the municipality.

The proposal to implement the RPP pilot project was an initiative of the employees of the autarchy, considering the need for practices aimed at preparing candidates for the retirement process. The project was designed and implemented by a multidisciplinary team, consisting of a social worker, a psychologist, and an occupational therapist. The activities were carried out by the members of the team and inviting professionals from some areas related to the topics approached.

The program had formal authorization by the superintendency of the autarchy and was carried out between April and December 2016. The experience was carried out in five stages, according to the actions developed: (a) Dissemination of the program; (b) Screening of participants; (c) Pre-program evaluation; (d) Program and thematic development; and (e) Post-Program Evaluation.

As qualifiers of the experience, quantitative and qualitative data collected from two semi-open questionnaires were presented, which were part of the stages of construction and improvement of the program: (1) Questionnaire 1 - applied before the start of activities, containing data such as expectations regarding the retirement process, retirement plans, and retirement preparation actions; and (2) Questionnaire 2 - applied after the end of activities, contained data such as program evaluation, change in understanding about retirement, change of plans for the post-retirement period, adoption of new attitudes to prepare for the post-retirement period, clarification and overcoming of doubts about retirement, overcoming expectations regarding the program and contribution to the preparation for retirement. We invited the participants to answer the questionnaires, and their participation was voluntary, optional, and without any identification requirement.

Quantitative data were tabulated in Microsoft Excel® 2010 spreadsheets and analyzed using simple descriptive analysis to calculate the minimum, maximum, mean, and standard deviation of each variable. Qualitative data were subjected to content analysis.

Intervention Stages

Dissemination of the program and survey of interested parties

Initially, the program was publicized to invite the servers to participate in the activities. Dissemination was carried out in various sectors through printed posters, informational documents, e-mails, television programs, and publications on the city hall's website and on the City Hall's social networks. During this stage, which lasted about a month, interested parties were able to enroll in the program via e-mail or telephone.

Screening of participants

After enrollment in the program, the responsible team screened the applicants, according to the inclusion criteria described below:

- Statutory public servers of the City Hall, City Council, and other municipal authorities in the aforementioned city;
- Public servers whose retirement due to contribution time or age was expected for the next two years;
- Public servers who had a permanence allowance;
- Public servers who were available to participate in the meetings;
- Public servers who agreed to participate in the project.

Thirty-six public servers enrolled in the program and, after the screening procedure, 30 participants were selected according to the inclusion criteria to participate in the program. After defining the number of participants, the location for the event was chosen.

Official notices were sent to the City Hall, City Council, and municipal authorities to communicate the places of work and the respective heads of those enrolled, listing the names of all those enrolled and requesting release to participate in activities without prejudice to remuneration.

PPA Pre-RPP evaluation

The third stage consisted of the pre-program evaluation, which was carried out using a semi-open questionnaire developed by the researchers. This stage aimed to identify the topics of interest and the needs of those enrolled to define the topics to be addressed in the program. The questionnaire was applied by the responsible team before the start of activities and contained questions about expectations and plans for retirement, actions for preparation, the concept of retirement, and expectations regarding participation in the program. Participation of those enrolled was voluntary and exempted from the identification requirement.

Program development and themes

After the evaluation, the pre-program was fundamental in defining the issues to be addressed, according to the interests and needs presented by the applicants. The program was structured with five thematic group meetings, with monthly frequency and an average duration of two hours each.

The activities were carried out in the auditorium of the City Hall of the Municipality, with the material resources used: chairs, projector, computers, speakers, paper, pens, and printed paper sheets.

(1) First Meeting

The first meeting began with group dynamics and aimed to introduce the participants and the team to their profile, professional life, and expectations regarding the program. Then, the objectives, the contents to be covered, and the employment contract were presented. Afterward, the social worker and the

occupational therapist from the PSSS team taught a class on the themes: retirement, aging, and the changes arising from these processes.

(2) Second Meeting

The second meeting aimed to bring information about the financial organization and health care. Therefore, this meeting was attended by specialist professionals, one from the economics area and the other from the health area, with an emphasis on prevention. Both brought contents that addressed the main changes in the economic and health sphere that may occur concurrently with the retirement process, and possible solutions for financial organization and health prevention.

(3) Third Meeting

In the third meeting, the occupational therapist and the psychologist from the PSSS team addressed possible psychosocial and occupational changes related to the retirement process and the possibilities for reorganizing the routine and using time for greater social participation and quality of life. The support material was also delivered through a booklet prepared by the multidisciplinary team, with updated information on the possibilities of activities available in the city in the following areas: cultural, educational, professional, sports, etc. This strategy aimed to inform about the possibilities of available activities that could be started/restarted not only after retirement but from the current moment.

(4) Fourth Meeting

In the fourth meeting, activities related to the theme of digital inclusion were carried out, to bring together and facilitate the participants regarding the use of new technologies, providing greater participation and autonomy. For this purpose, the participants were divided into three groups with a maximum of 10 members each. An information technology professional from PSSS was responsible for guiding the correct, conscious, and safe use of current digital resources, such as software, applications, and social networks. This activity was carried out in the meeting room of the PSSS building due to the availability of notebooks, allowing all servers to follow the activities individually.

(5) Fifth Meeting

Finally, the fifth meeting was held by professionals from the legal area of the PSSS to elucidate the main points related to the social security rights of statutory employees, such as retirement rules, criteria for permanence allowance, criteria for death pension, among others. This meeting sought to clarify doubts related to the rules for counting for retirement and guidance on current possibilities. Finally, an informative booklet containing the main topics covered during the class was delivered.

Post-RPP Reevaluation

At the end of the last meeting, all participants were invited to answer a semi-structured questionnaire to evaluate and improve the proposal. The questionnaire was prepared by the PSSS multidisciplinary team and addressed the following

issues: program evaluation, change regarding the understanding of retirement, change of plans for post-retirement, adoption of new attitudes to prepare for post-retirement, clarification, and overcoming of doubts about retirement, exceeding expectations of the program, contribution to the preparation for retirement, suggestion for improvement of activities, the possibility of referral to a co-worker. Participation was voluntary and without an identification requirement.

Results and Discussion

Motivations and expectations regarding the program

In total, 28 participants answered the initial questionnaire. Approximately 71.4% (n=20) showed a positive outlook regarding retirement, relating it to new possibilities and greater availability of time, as observed in the following report: “*I believe it is an opportunity to develop other life projects*”. Regarding the retirement process, 79% (n=22) of the participants indicated that they had different expectations (Table 1): having more free time (n=7), performing more leisure activities such as travel (n=7), start another paid job (n=4), perform more health care and seek a better quality of life (n=4), have more time to socialize with friends and family (n=3) and volunteer work (n= two). These data demonstrate that the retirement phase was seen as a moment of new possibilities.

Table 1. Expectations, plans, and preparation for the program (n=28).

Categorical variables	%	n
<i>Expectations regarding the retirement process</i>		
Yes	79	22
No	14	4
Doubts	7	2
<i>Retirement plans</i>		
Yes	60	18
No	40	12
<i>Preparing for Retirement</i>		
Yes	18	5
No	82	23

On the other hand, some participants showed doubts and insecurity in this process (n=7): “I don't know what to do after leaving active duty, I have no security outside my job”. This view may be due to the overvaluation of work in our society, in which retirement is seen as something negative (Soares et al., 2007). Another possibility is the presence of a feeling of insecurity due to the possible changes arising from this process and, consequently, the need to (re)build future projects (Alves & Alves, 2015; Soares et al., 2007). Understanding these difficulties among the participants motivated the team to include the theme of

time use and routine reorganization among the program's activities to encourage social participation and quality of life through engaging in pleasurable activities.

Although many participants related retirement to a time of new possibilities, around 21% (n=6) had no expectations regarding this process, 40% (n=12) had no plan for this stage of life and 82% (n=23) did not perform any activity to prepare for retirement (Table 1). These findings may indicate a lack of preparation in this stage and the presence of difficulties in organizing and planning for what to do after leaving work, which was also identified in other studies (Barbosa & Traesel, 2013; Marangoni & Mangabeira, 2014). This reality motivated the choice of other themes, such as financial organization, health prevention, and digital inclusion.

Regarding the expectations in participating in the program, were observed the need for guidance/clarification/knowledge on the subject (n=17), the preparation from the psychological point of view (n=3), and interest in exchanges of information/experiences about the retirement process and changes arising from this process (n=2). One of the participants pointed out the need to better understand the social security aspects to prepare for retirement: *“I want to better understand the legal aspects, my rights and be able to plan this new phase of life”*. Another pointed out the need to better understand the process of transition to retirement: *“I seek clarification on this new phase, the influence on our lives and on the psychological aspects of those who still have a lot of energy”*. These findings reinforced the decision for the themes: retirement, aging, and the changes arising from these processes and social security rights.

Other studies also observed the strategy of assessing the needs of participants before starting the activities (Pazzim & Marin, 2016; Murta et al., 2014). We believe that this stage was of great relevance in identifying the aspects that were later addressed in the experience, favoring the structuring of activities based on the real needs of the participants.

Final Evaluation from the Perspective of the Participants

The experience had the participation of 28 public servers, with an average of 18 per meeting. This study followed a trend from other experiences reported in the literature in which an RPP was performed in public services (Marangoni & Mangabeira, 2014; Murta et al., 2014; Soares et al., 2010; Soares et al., 2007). The adoption of the group work strategy was also mentioned in other experiences (Martins & Borges, 2017).

After completing the activities, 17 public servers participated in the re-evaluation of the program. We observed that 100% (n=17) evaluated the program positively, with 53% considered it good (n=9) and 47% considered excellent (n=8). We also observed that 71% (n=12) of the participants claimed to have changed their understanding of retirement after participating in the program (Table 2). Only one server reported having started to face life more naturally: *“It made me face it as a normal process of life”*. A better understanding of retirement is important to demystify preconceived ideas and give new meaning to the experience in this process.

Table 2. Final evaluation from the perspective of the participants (n=17).

Categorical variables	%	N
<i>RPP evaluation</i>		
Excellent	47	8
Good	53	9
Regular/Bad	0	0
<i>Change in understanding about retirement</i>		
Yes	71	12
No	23	4
No answer	6	1
<i>Change of plans for the post-retirement period</i>		
Yes	47	8
No	53	9
<i>Adoption of new attitudes for post-retirement</i>		
Yes	71	12
No	29	5
<i>Questions about the process were clarified</i>		
Yes	94	16
No	0	0
No answer	6	1
<i>Expectations regarding the PPA were met</i>		
Yes	82	14
No	0	0
No answer	18	3
<i>The RPP contributed to the preparation for retirement</i>		
Yes	82	14
No	0	0
No answer	18	3

Approximately 94% (n=16) of the sample reported having clarified doubts regarding the retirement process, while 82% (n=14) indicated that their expectations were met throughout their activities (Table 2). One of the participants pointed out clarification of doubts about social security rights: *“I had many doubts about my rights, the course helped me to understand better”*. Another participant pointed out: *“Every employee should go through this process, as there are many doubts and this is a time to resolve them.”* These clarifications were important, as, in the initial evaluation, 17 employees reported doubts about the process.

About 47% (n=8) of the sample reported changes in plans for the post-retirement period, related to the use of time for new activities (n=5), starting activities for a better quality of life (n=2), and identification of the opportune time to start the benefit (n=1) (Table 2). One of the participants pointed out: *“The program motivated the review of plans, the search for new perspectives and quality of life”*. These findings are in line with notes that consider this prior care for the worker as essential as a fundamental factor for the construction of projects for the future and identity (Araújo et al., 2005). They also corroborate with statements that point out the importance of these actions in promoting

quality of life, which can be compromised with the loss of the worker role and the consequent changes in daily life (Barbosa & Traesel, 2013).

We observed that 82% (n=14) stated that the program contributed to the beginning of preparation for retirement and 71% (n=12) reported having adopted new attitudes to prepare for this process, for example, in terms of financial organization (n=2) and health care (n=1) (Table 2). One participant pointed out: *“I’ve already started to organize myself personally and financially”*. Another also pointed out: *“The RPP contributed to taking measures of economic and health prevention to enjoy retirement.”* A third participant remarked: *“For me, it was an opportunity to prepare my life daily”*. This evidence confirms the authors' points towards the importance of RPP in promoting chances and opportunities for workers to organize and plan for several aspects for this new phase of life (Silva et al., 2012; Soares et al., 2007).

We believe that the data and reports that demonstrated satisfaction with the program may have resulted from the integrated work between different areas of professional practice. This working model has already been suggested by other researchers, who point out this need due to the complexity of the theme (Antunes, 2014; Zanelli et al., 2010). Teamwork has also been observed in other experiences aimed at preparing workers from different public sectors for retirement with positive results (Murta et al., 2014; França et al., 2014; Costa & Soares, 2009).

Another positive aspect observed was the active participation of servers through comments, questions, and interaction with the team during lectures and dynamics, favoring learning and exchanges between the group. We believe that the group strategy has favored participation and exchange among participants. This corroborates with notes from other authors about the importance of this type of experience in terms of reducing participants' anxiety, providing the exchange of experiences, and making the theme of retirement less frightening throughout the program (Martins & Borges, 2017).

Despite this, the main difficulty was the rotation of participants in the program meetings. This was because of the difficulties reported by some of the servers in participating in activities as a result of work activities (n=3). One of the participants pointed out: *“Unfortunately, by force majeure, I missed two days because of work”*. This may have been because the program took place during business hours, in which most servers perform their work activities. Although the employees were released to participate in the activities, some work commitments, due to their unavoidable nature, compromised the server's participation.

Finally, some participants suggested the continuity of the program (n=14), the flexibility of the schedule (n=2), deepening of some themes (n=1), dynamics between the participants (n=1), and greater disclosure (n=1). One of the participants suggested: *“The timetable for the courses was diversified, we had difficulty in organizing the time off at work”*. The strategy of understanding the participants' point of view to improve the proposal was also used in other experiences with RPP (Pazzim & Marin, 2016; Murta et al., 2014). The need to improve the activities is highlighted according to the participants' proposals for the next editions of the program.

Final Considerations

The pilot project with a multidisciplinary approach proved to be positive for preparing for retirement, helping to clarify doubts, change understanding about this phase of life and implement preparatory actions for this process. The experience contributed to the redefinition of the concept of retirement and the process, changing the decision to opt for the benefit or not, and building new perspectives for the future.

Despite this, we recognize that the study had a limitation that not all participants answered the final questionnaire. Therefore, the data only indicate the opinion of part of the participating group. Rotation in participation in the meetings is also pointed out as an aspect that may have interfered with the absorption of the content, harming the program's objective, as well as the final evaluation of the activities carried out. We suggest other studies aimed at understanding the effectiveness of multidisciplinary and interdisciplinary actions aimed at preparing for retirement and the effects of this type of practice in the long term, post-retirement, as well as the increase in the number of participants so the data can be generalized.

We expect that this study can motivate the implementation of other retirement preparation programs for workers in the public and private sectors, aiming at planning and organizing their daily lives and improving the quality of life before, during, and after the retirement process.

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