

The Chinese University of Hong Kong The Nethersole School of Nursing

Cadenza Training Programme

CTP002: Psychosocial and Spiritual Care

Chapter 1 : Major life events in late adulthood:
process of adaptation and psychosocial consequences

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Lecture Outline

- What is a life transition?
- What is a life event?
- Major life events in late adulthood



What is a Life Transition?



Life transitions

- Adams, Hayes, & Hopson (1976) defined a transition as

“a discontinuity in a person's life space”

- It is often triggered by major life event(s) and shaped by the individual's perception of the event(s).

(Theorell, 1992)



Life transitions

- Life transitions can cause a **major change** to a person's life patterns and well-being.
- This interruption can put his or her **health, identity** and **self-esteem** at risk.

(Liddle, Carlson & McKenna, 2004)



Categories of transitions

- Transitions can be categorised in different ways.
- One approach differentiates transitions into three types by their nature:
 1. developmental transition
 2. situational transition
 3. health and illness related transition

(Liddle, Carlson & McKenna, 2004)

1. Developmental transition

- **Anticipated normative changes** that occur in the lifespan, including puberty and physical aspects of ageing.
- Support might be available from peers who are facing similar situations.

(Jarrett, 2000; Liddle, Carlson & McKenna, 2004)



2. Situational transitions

- **Unexpected events** that occur at any point in life, including unemployment and relationship difficulties.
- Tend to be **unexpected** and **not controlled** by the person.

(Jarrett, 2000; Liddle, Carlson & McKenna, 2004)

3. Health and illness related transition

- Regarded as a separate category and includes **changes to health status**, whether long-term or acute.

life transition to later life is a kind of developmental transition and may include situational transitions and health and illness transitions.



Categories of transitions

- Another model for organising transitions is based on the control and the expectation a person has about the transition.



Categories of transitions


- The four major types of transition under this category:
 - Predictable-voluntary
 - e.g., moving house
 - Predictable-involuntary
 - e.g., mandatory retirement at 65
 - Unpredictable-voluntary
 - e.g., a new job opportunity
 - Unpredictable-involuntary
 - e.g., accidents or illness

(Blair, 2000)

Categories of transitions

- This model describes a transition from a personal viewpoint and gives an indication of the types of coping that might be available to that person.
 - For example, prior planning and feelings of control over the predictable-voluntary situation.

Life transition to later life is usually predictable and can be voluntary or involuntary.



Coping process of life transition

- With the diversity of life transitions, broad frameworks (transition models) have been developed for describing the ways in which people cope with life transitions.



Transition model

This process recognises a cycle of four stages during a life transition.

– Preparation

- the formation of adaptive expectations and feelings about the change

– Encounter

- the development of confidence in personal coping skills and enjoyment of the situation

– Adjustment

- the development of new roles and personal change

– Stabilisation

- a sustained positive experience in the new situation

Transition model

Another transition model (Adams, et al., 1976) describes seven stages of coping.

- Initial immobilisation
 - unable to plan or act in response to the transition
- Minimisation
 - attempts to cope with the transition, impact of transition denied or reduced
- Depression
 - when the impact of the change is realised
- Acceptance
 - acceptance of the change and letting go of other expectations



Transition model

- Testing
 - testing new behaviours and lifestyles
- Search for meaning
 - used of cognitive strategies
- Internalisation
 - new behaviours and values become part of the person

The seven stages are not found in all transitions, however, two coping tasks, the **management of strain** and **cognitive tasks**, are relevant to all transitional events.



What is a life event?

Life events

- Life events are defined as *distinct disruptions to the life pattern, causing a substantial change and readjustment.*
- Life events are different from developmental transitions, as these are not always anticipated normative changes that occur in a lifespan.

(Jang & Haley, 2002; Haley & Jang, 2002; Liddle, et al., 2004)

Life events as stressors

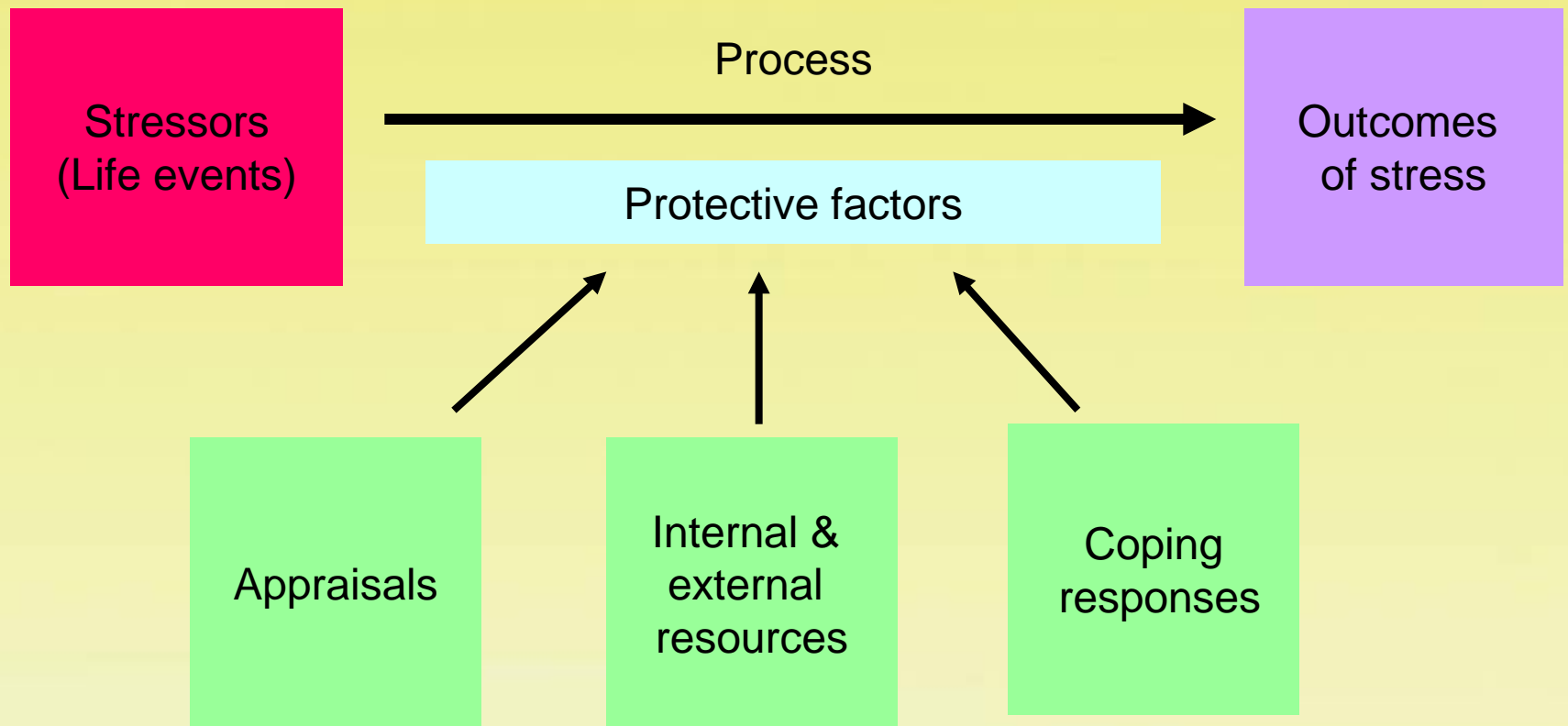
- Stressors are broadly categorised into two types:
 - life events: discrete stressors that have a relatively clear onset
 - chronic strains: continuing and enduring problems or threats

Life events are considered one type of stressor, chronic strains another.

(Haley & Jang, 2002)

Life events as stressors

- Stress process model



(Haley & Jang, 2002)

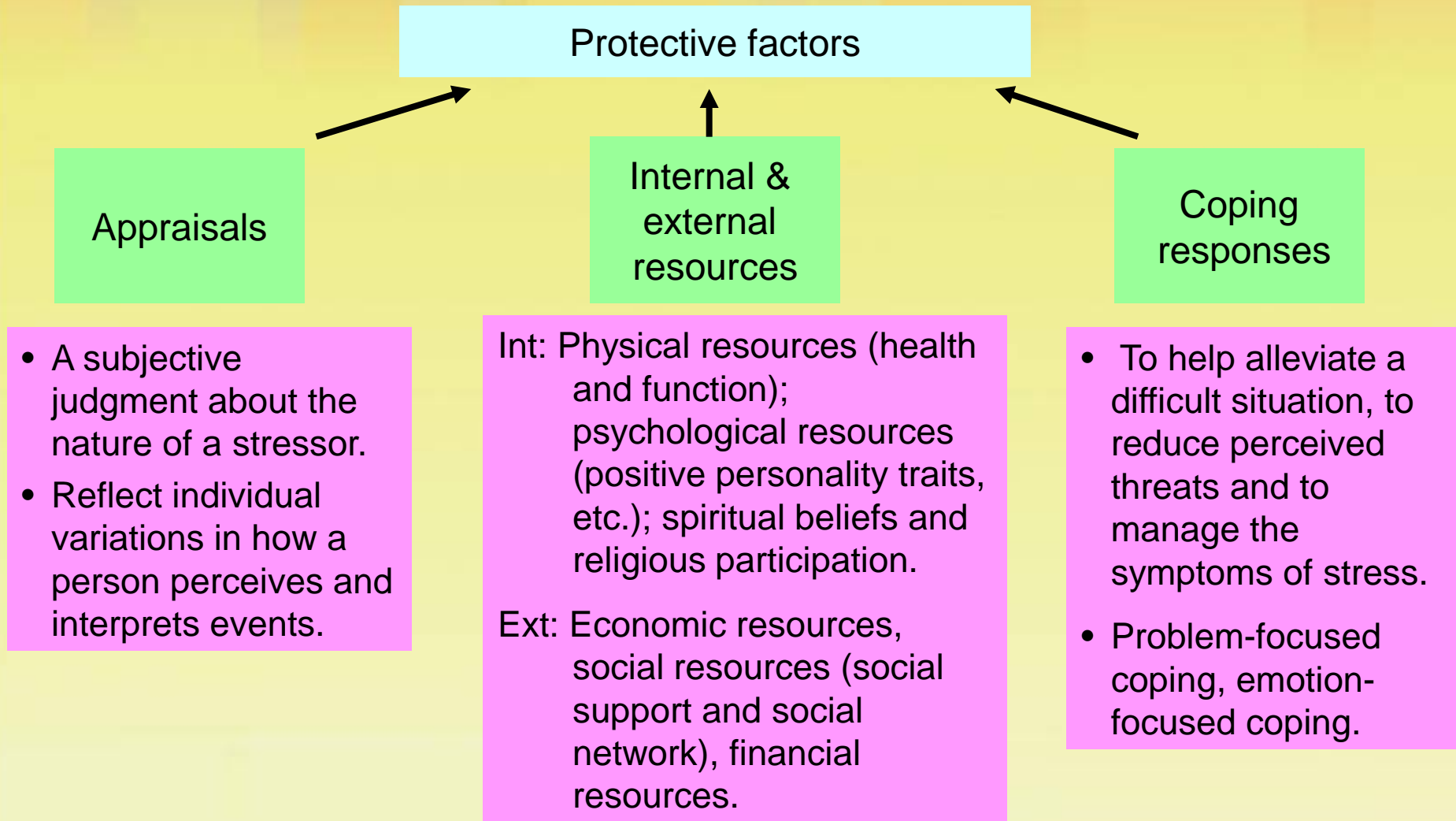


Stress-process model

Protective factors

- are factors that may decrease the negative impact of stressors and include
 - appraisals of stress
 - internal and external resources
 - coping responses

Stress-process model





Stress-process model

Outcomes of stress:

- **Balancing act:**
 - the experience of stress can be seen as a "balancing act" between stressors and protective factors
 - multiple life events can alter an individual's resources when coping with life situations

(Glass, Kasl, & Berkman, 1997; Haley & Jang, 2002)



Stress-process model

Outcomes of stress:


- Individualised responses to life events:
 - the occurrence of the same event can yield different meanings in each individual, depending on his or her subjective appraisal

(Jang & Haley, 2002; Liddle, et al., 2004)



Major life events in late adulthood

Life events in late adulthood



Importance of studying life events in late adulthood

- Individuals from different age groups are exposed to different sets of life events.
- Studying life events in late adulthood is very important as this can not only improve our understanding of human development and adaptation, but also serve as a basis for interventions and social policies.

(Jang & Haley, 2002)

Life events in late adulthood

Age differences in the occurrence of life events

- It has been found that older people generally experience **fewer life events** than younger adults. For example: job stress, marriage and job promotion.
- Although the overall number of events that older people experience may decline, they are more likely to encounter **some stressful life events**. For example: health deterioration, retirement, death of spouse or old friends.



Life events in late adulthood

Age differences in the occurrence of life events

- The impact of life events is greater because ageing may lead to a decline in some coping resources (e.g. physical and social resources) and the greater possibility of the occurrence of different life events at the same time.



Life events in late adulthood

Age differences when responding to life events

- Age-normative events:
 - some events experienced by older people are expected by most people to occur later in the life cycle
 - when the events are predictable and anticipated, the **adverse impact may be limited** as individuals are prepared for them

(Jang & Haley, 2002; Liddle, et al., 2004)



Life events in late adulthood

Age differences when responding to life events

- Network events:
 - older people are more likely than younger people to be affected by events that occur to the people they are close to and become vulnerable to these events
 - for example: illness of friends, adult children's marital or financial problems.



Life events in late adulthood

Age differences when responding to life events

- Non-normative events:
 - unpredictable and untimely events, such as the death of an adult child, may interfere with adjustment and adaptation and have a devastating influence on the physical and emotional well-being of older people

(Jang & Haley, 2002)



Life events in late adulthood

Age differences when responding to life events

- Older people who have a **wide and varied experience** of life events may tend to perceive life events as less troublesome.
- The **experience of seeing others** undergo life events may aid older people in coping with life events.
- **Concurrent life events** may have different meanings when compared to a single event.

(Jang & Haley, 2002)



Major life events in late adulthood

Adaptation model: SOC

Adaptation in late adulthood

- One way of conceptualising optimal resource use in late adulthood is offered by the model of **Selection, Optimisation and Compensation (SOC)**.
- The SOC model describes three strategies of adaptively responding to everyday demands and functional decline in later life: selection, optimisation and compensation.

(P. B. Baltes & M. M Baltes, 1990)



SOC model - selection

Selection in everyday life:

- reducing the number of activities, goals, or domains
- focusing on the most important, preferred and meaningful things in one's everyday life
- facing challenges that require re-organisation of goal priorities or of activities



SOC model - selection

Selection in everyday life:

- When confronting ageing losses, older people may respond by concentrating on a few activities that are most relevant to achieving their goals.
- This may help to preserve resources for obligatory routine activities and keep up health or independent living.

SOC model - compensation

Compensation in everyday life:

- use of **new and alternative means** or resources to reach a goal or maintain a desired state, once losses have occurred
- this is expected to occur solely in the context of loss or decline
- when experiencing ageing losses, older people may seek to compensate for it through **regeneration**

SOC model - compensation

Compensation in everyday life:

- resource-rich older people are known to be more capable of compensating when confronted with losses than resource-poor older people
- for example, older people may sleep more during the daytime in order to compensate for losses which cause them to tire quickly

(Baltes & Carstensen, 1996)

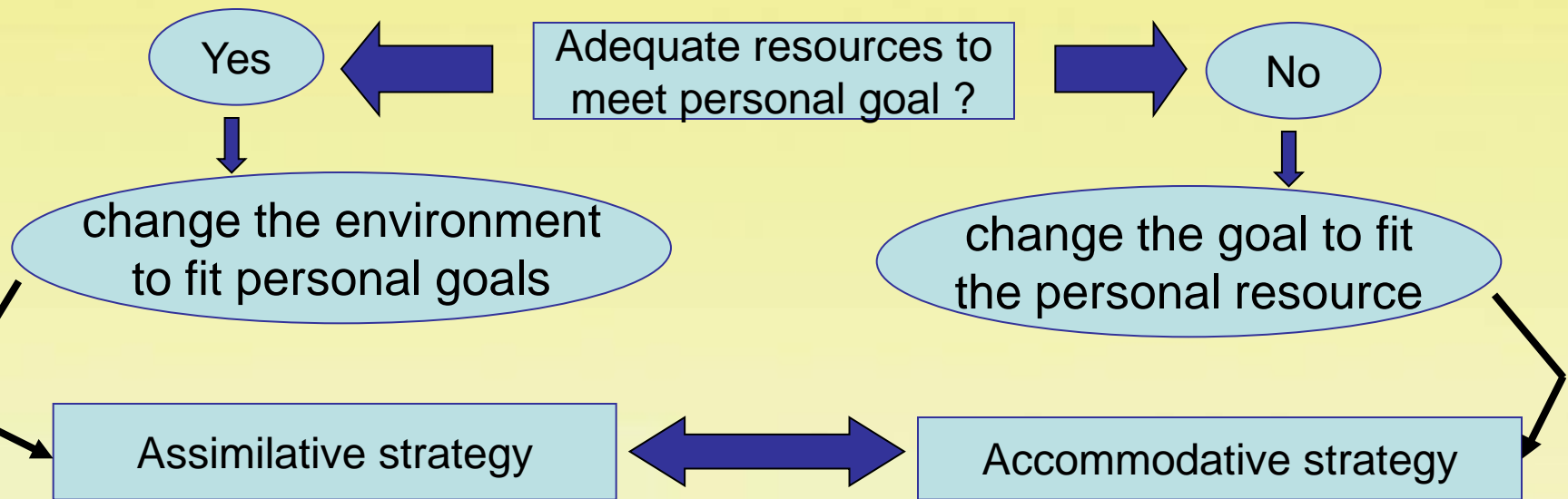
SOC model – optimisation

Optimisation in everyday functioning :

- **enhancement and refinement** of the means to maximise an individual's resources in a selected domain of functioning
- refers to adaptive strategies where no direct or indirect ageing losses have occurred and where an actual amelioration or maximisation of means can be found.
- Investing more time and effort in specific activities results in getting the most out of these activities.

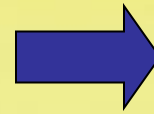
(Baltes & Carstensen, 1996)

SOC strategy



SOC strategy: An illustration

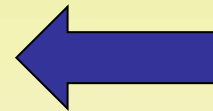
Mrs Wong is a 75-year-old grandmother, happily taking care of her grandchildren.



One day, she slips and falls, sustaining a hip fracture and henceforth requiring a walking aid for mobility.

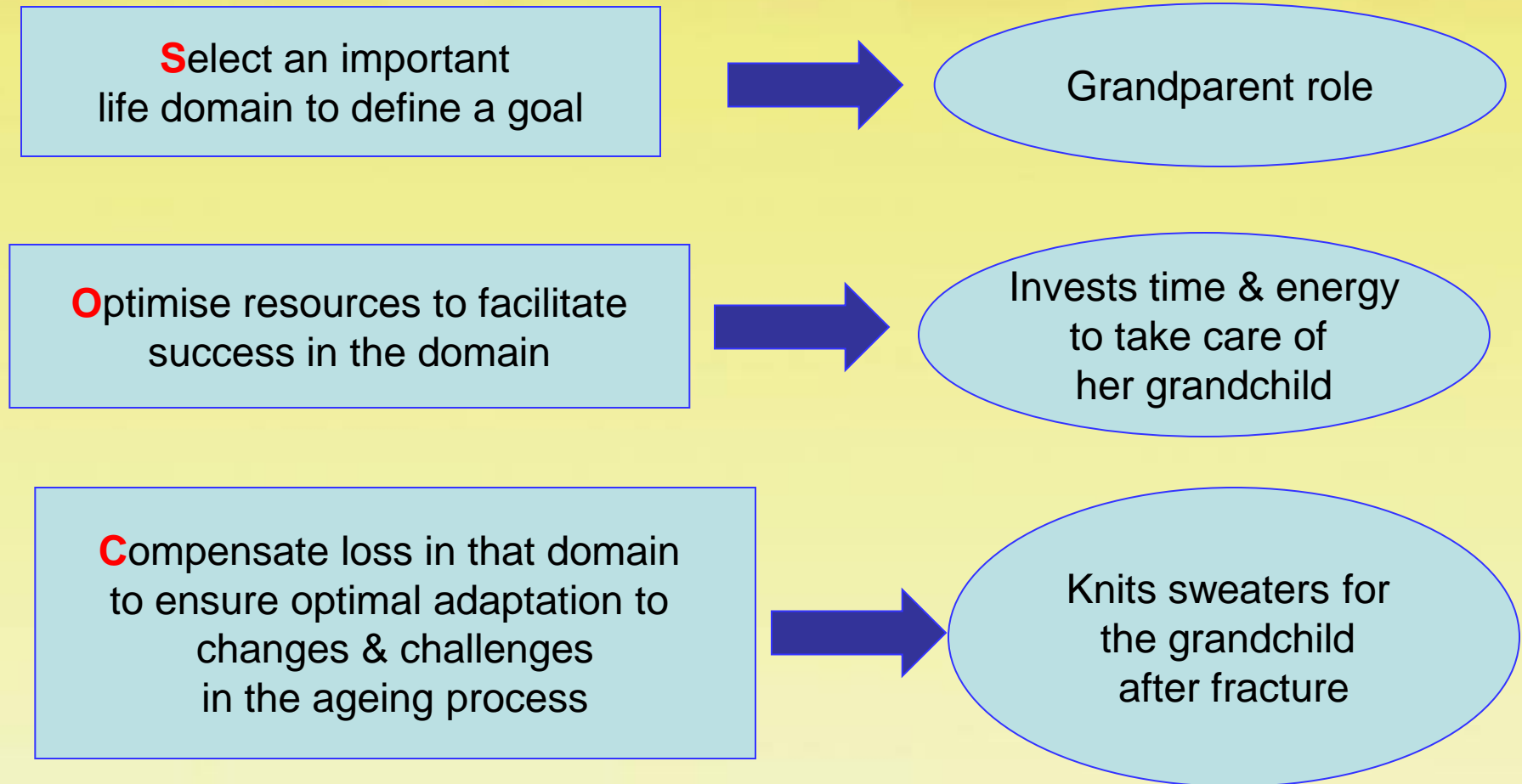


She continues her grandparenting role through other activities (e.g., knitting sweaters)



She can no longer care for her grandson as she used to before the accident

SOC strategy: an illustration




SOC model

- A 4-year longitudinal study has shown that resource-rich older people
 - invest more social time with their family members
 - reduce the diversity of activities within the most salient leisure domain
 - sleep more often and longer during daytime
 - increase the variability of time investments across activities


Overall, the findings suggested a greater use of selection, compensation, and optimisation strategies in everyday functioning among resource-rich older people than resource-poor older people.

(Lang, Rieckmann & Baltes, 2002)



Common major life events in late adulthood

Retirement
Relocation
Empty nest
Spousal bereavement



Common major life events in late adulthood

Retirement



Retirement

Definition of retirement:

- retirement is an "age-related withdrawal from active working life"
- is an important transition in the life process that requires certain physical and psychological adjustment

(Cui & Vaillant, 2001; Shaw & Hill, 2002)

Process of retirement

- Phase 1: Preretirement
 - Remote stage: long before retirement
 - Near stage: just before retirement. People make plans to leave their jobs.
- Phase 2: The honeymoon
 - Takes place just after retirement. People catch up on the work that they have had no time to accomplish during employment.
- Phase 3: The retirement routine
 - Takes up the *retirement role*. Their routine may include leisure, volunteer work, etc.
- Phase 4: Disenchantment
 - Feel disenchanting with retirement. The feeling of relief from work fades.
- Phase 5: Termination
 - Retirement ends when people return to work or when they lose their independence.



Factors determining the impact of retirement

It is determined by:

- voluntary or non-voluntary retirement
- predictable or unpredictable retirement
- substitute for working role
- financial security



Myths of retirement

Myth 1: it is not necessary to plan for retirement

- Studies show that poorer adaptation is associated with those without retirement planning.

(Shobe & Sturm, 2007)

Myth 2: older people will become very bored after retirement

- Studies show that older people who expected to have meaningful lives after retirement have better quality of life than those without expectations.

(Gall & Evans, 2000)



Z^{'''}Myths of retirement

Myth 3: retirement = useless and worthless

- Studies show that older people who have participated actively in social activities have better life satisfaction.

(Kim & Feldman, 2000)

Myth 4: health will deteriorate after retirement

- Health deterioration is not directly related to retirement. This may just happened coincidentally with retirement due to old age.
- The deterioration of health is mainly the result of an unhealthy lifestyle after retirement.

(Woods, 1996)



Impact of retirement - loss

- loss of stable income and the enjoyment of shopping
- loss of self-worth, job satisfaction and social status related to the employment
- loss of the chance to have social gatherings with colleagues; narrowed social network
- not enough activities to fill each day after retirement

(Elderly Health Services, 2003)



Impact of retirement - benefits

- reduced strain of working role and the demands associated with employment
- decreased routine expenditure related to employment
- more flexible use of time and more free time

(Elderly Health Services, 2003)



Promoting better adaptation

- accept the "losses" associated with retirement and utilise the "gains"
- utilise free time
- develop a healthy lifestyle
- enjoy family life
- enjoy marital relationships
- participate in social activities
 - e.g., voluntary and leisure activities

(Elderly Health Services, 2003)


Voluntary activities after retirement

- Older volunteers have increased life satisfaction and better mental health, and also engage in higher levels of physical and cognitive activity.

(Morrow-Howell, 2007)

- A study on retirees (n=371) indicated that:
 - participation in voluntary activities was positively related to life satisfaction and retirement satisfaction

(Kim & Feldman, 2000)



Common major life events in late adulthood

Relocation



Relocation

- Relocation is a widely studied life event in late adulthood as it frequently affects the lives of older people.
- This is often preceded by declining health, financial problems and death of spouse.

(Armer, 1996)



Relocation

Different types of relocation in late adulthood:

- from one home to another home
- from home to a residential home
- from one residential home to another residential home

(Cui & Vaillant, 2001)



Relocation

- Amongst the different types of relocation, the transition from home to **residential home** has been identified as the most significant relocation affecting older people.
- Older people not only confront the change in physical location of primary living space but also a **change in daily life patterns, social networks and social support.**

(Lee, Woo & Mackenzie, 2002a)

Relocation

- The perceived likelihood of having to move to a residential care home has been found to be one of the most pervasive **sources of fear** and **stress** affecting older people.

(Lee, 1997)

- **Social stigma** is attached to residential care placement. The transition from home to residential home is often regarded as the "**final sign of failure**".

(Higgs & Victor, 1993; Victor, 1992)



Relocation

- The goal in helping older people adjust is to assist them in the process of regaining normality with the different aspects of residential home living.



Relocation

- "Adjustment"
 - refers to how well older people resolve the physical and social demands as a result of the relocation and stabilise to become members of the residential home

(Joiner & Freudiger, 1993)

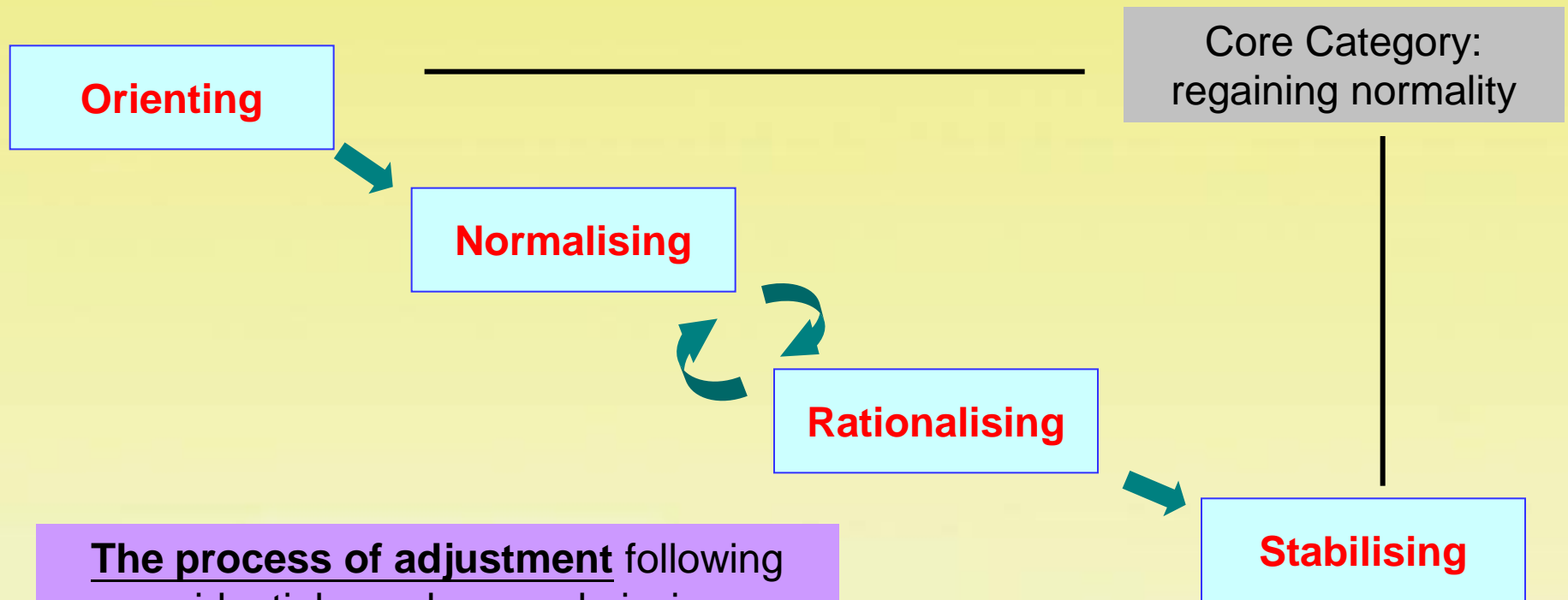


Relocation

- A local qualitative study was conducted
 - to explore the process of adjustment for Chinese older people following a move to residential home
 - 18 older people were interviewed one week after their admission and then every month until no new information could be discovered
 - total of 98 interviews were carried out

Relocation

- The study discovered that the newly admitted older people adjusted through the following four stages:



The process of adjustment following residential care home admission.



Relocation

– Orienting:

- individuals begin to gain a realistic understanding of what goes on inside the home and attempt to establish the boundaries of normality

– Normalising:

- individuals struggle to maintain normality within the boundaries set by the home


– Rationalising:

- individuals come to terms with the re-established life inside the home

– Stabilising:

- individuals regain a sense of normality comparable with their previous life

(Lee, Woo & Mackenzie, 2002b)



Common major life events in late adulthood

Empty nest



Empty nest

- Empty nest is a **normal phase** of family development.
- This is the phase that occurs when the children of the family are grown and no longer living at home.

(Raup & Myers, 1989)



Empty nest

- Empty nest = postparental period
- The postparental period, with all of its positive and negative potential, represents a major life change or transition.

(Raup & Myers, 1989)

- It is normal to feel sad, lonely or even to spend time in the absent child's bedroom to feel closer to the child.

(Liu & Guo, 2007)



Empty nest

- **Empty nest syndrome** is a maladaptive response to the postparental transition.
- This is commonly characterised by
 - overwhelming grief
 - severe sadness
 - dysphoria
 - depression

(Borland, 1982; B. Kahana & E. Kahana, 1982)



Empty nest

- All parents, **especially mothers**, are potentially vulnerable to the effects of this period.
- Commonly happens **concurrently with other life events**, e.g. retirement, menopause, etc.
- **Work** is known to be a significant protective factor in adjusting to this period.



Preparing for empty nest

- Preparing for empty nest while the children are still living at home is one suggestion.
 - develop friendships, hobbies, career, and educational opportunities
 - make plans with the family.

(Diagnostic and Statistical Manual of Mental Disorders, 2009)



Coping with empty nest syndrome

- Early identification
- Develop a **proactive programme** to reduce the effects of this transition
 - individual and group counselling
 - exploration of roles
 - identification and enhancement of support systems
 - identification of existing coping skills and resources
 - training in new ways of coping

(Diagnostic and Statistical Manual of Mental Disorders, 2009;
Raup & Myers, 1989)



Coping with empty nest syndrome

- A study done by Liu and Guo (2007) indicated that reducing the level of loneliness amongst the empty nest elderly (n=275) in a mountainous rural area of China may have improved their quality of life.




Coping with empty nest syndrome

Loneliness is:

- positively correlated to the age of the older people
- negatively correlated with their physical and mental health condition
- negatively associated with social supports & income
- positively associated with education level & being single

(Liu & Guo, 2007)




Common major life events in late adulthood

Spousal
bereavement

Spousal bereavement

- Beverly Raphael (1983) noted that spousal loss
"cut across the very meaning of the other's existence"
- For older married couples, spousal loss is a **ubiquitous experience**; the only way to avoid such loss is to die first.
- The successful mastery of this transition is an important features of the ageing process.

(Wolff & Wortman, 2006)




Spousal Bereavement

- The aftermath of spousal bereavement has been described as follows:

"Everyday occurrences underscore the absence of your mate. Sitting down to breakfast, or dinner, opening mail, hearing a special song, going to bed, all become sources of pain when they were formerly sources of pleasure. Each day is full of challenges and heartbreak."

(Weizman, & Kamm, 1985)



Consequences of spousal loss

- increase in physical health problems
- increase in emotional disorders, especially depressive symptoms and anxiety
- increased prevalence & severity of somatic symptoms
- higher health care consumption
- increased alcohol and tobacco consumption
- more disturbed sleep patterns
- increased mortality risk



Spousal Bereavement

Following situations may increase the likelihood of *positive coping*:

- Attitude towards widowhood
 - older people who perceive widowhood as a "normal" and expected part of life would more able to plan for the challenges
- Peer support from widowed couples
 - older people who have social connections with widowed peers may adjust better
- Wisdom-related knowledge
 - older people who have learned from experience of how to manage life's difficulties, may better adapt to this life event

Spousal Bereavement

Following situations may increase the likelihood of negative coping:

- Shrunken social networks & support
 - Relating to death of close friends, deteriorating health, reduced social participation would restrict the external resources to cope with this life event.
- Many couples have strong, deep and interwoven relationships
 - Often highly dependent on one another for companionship.
 - Rely on their spouse for assistance with daily living tasks, particularly if they are ill themselves. Therefore, the loss of a spouse may be accompanied by a loss of independence.
 - Older couples may have such closely interwoven relationships that the death of the partner may cut across the very meaning of the other's existence.

Spousal Bereavement


Following situations may increase the likelihood of negative coping: (cont'd)

- "Bereavement overload"
 - The accumulating loss of friends and family members not only leads to an erosion of social support, but also further depletes adaptive resources.
- Decline in socioeconomic status and income
 - Decreases the freedom in choosing living arrangements.
- Role losses
 - e.g., loss of employment.
 - The accumulating role losses can rob older people of social identity and result in feelings of uselessness and futility.



Mourning process

- Mourning describes the process which occurs after a loss.
- J. William Worden (1991) suggested that mourning may be divided into four basic tasks.



Mourning Process

- Four tasks of mourning
 - Task 1: to accept the reality of the loss
(help actualise the loss)
 - Task 2: to experience the pain of grief
(help the bereaved to identify & express feelings)
 - Task 3: to adjust to an environment in which the deceased is missing
 - Task 4: to emotionally relocate the deceased and move on with life



Mourning process

- It is not necessary to finish the tasks in seriatim.
- However, it is essential for the bereaved to accomplish these tasks before mourning can be completed.
- Uncompleted grief tasks can impair further growth and development. (Worden, 1991)

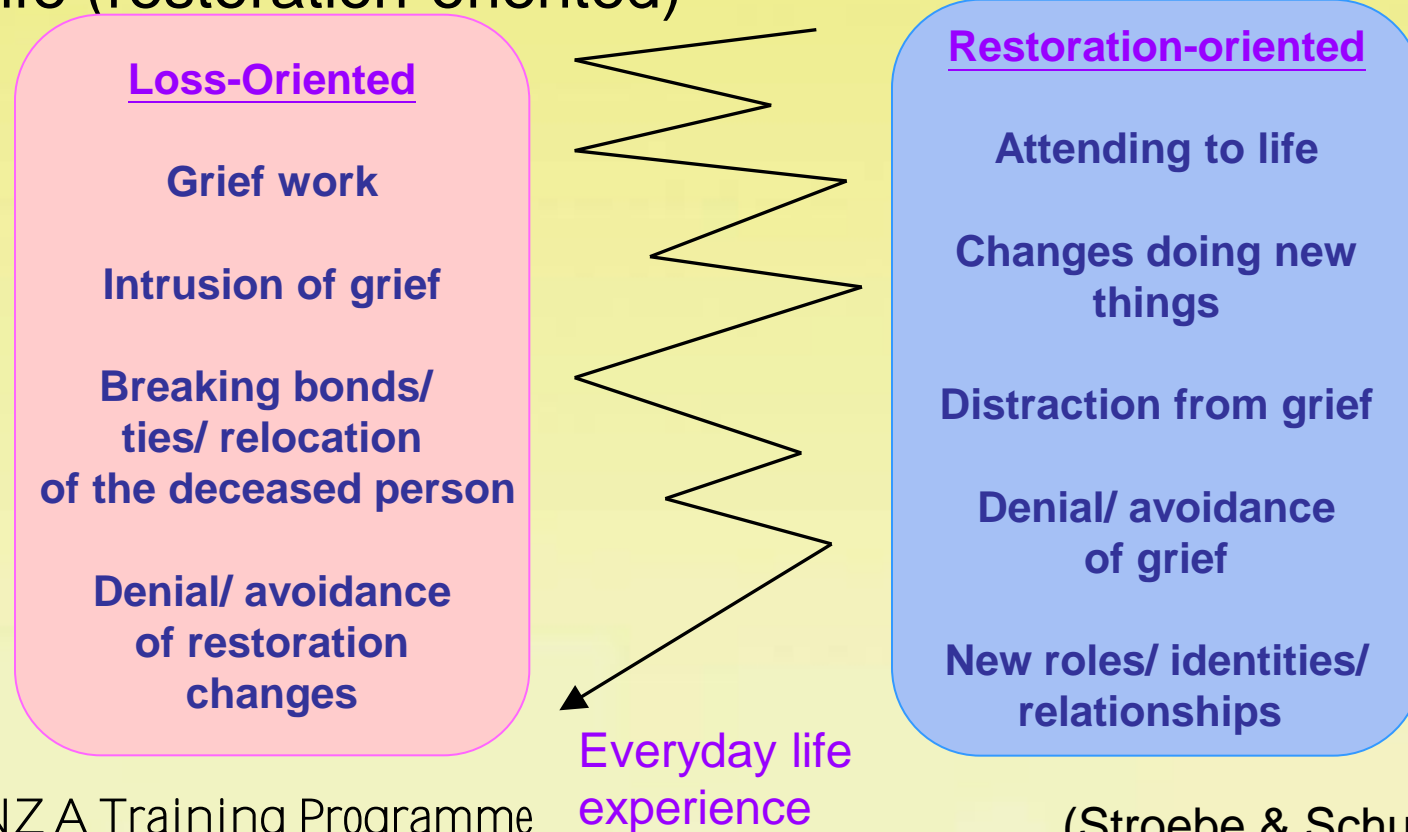


A Dual Process Model (DPM) of coping with bereavement

- Stroebe & Schut (1999) discovered there are two types of stressors that the bereaved has to face when coping with bereavement: loss-orientated and restoration-orientated.
- The bereaved may experience a process of oscillation - the alternation between loss- and restoration-oriented coping and the process of confrontation and avoidance of different stressors associated with bereavement.

A Dual Process Model (DPM) of coping with bereavement

- shows the relationship between dealing with the stresses of the loss itself (loss-oriented) and moving on with one's life (restoration-oriented)





A Dual Process Model (DPM) of coping with bereavement

- It is postulated that the oscillation is necessary for optimal adjustment over time.
- Each bereaved should adjust at his/her own pace and oscillate between the loss- and restoration-orientation, in order to work through the grief and adapt to life without the deceased.

(Stroebe & Schut 1999)

Conclusion



Conclusion

- Transition to later life is a challenging period.
- Major life events are inevitable in later life and may cause detrimental psychosocial consequences.
- Successful transition to late life relies on effective coping strategies.

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The end of chapter 1

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