

The Chinese University of Hong Kong
The Nethersole School of Nursing

Cadenza Training Programme

**CTP001: Successful Ageing and Intergenerational
Solidarity**

Chapter 1: An Update of Terminologies, Concepts & Principles of Successful Ageing

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The Hong Kong Jockey Club Charities Trust



Lecture outline

- t an overview of definitions and terminologies of successful ageing
- t exploring the concepts and principles of successful ageing from
 - 4 a theoretical perspective
 - 4 concept analysis
 - 4 a lay perspective
- t principles of promoting successful ageing



An overview of the definitions and terminologies of successful ageing



Ageing is a natural process

1. What will we look like when we are old?
2. How should we face ageing?

We would like to age successfully

Successful Ageing is...

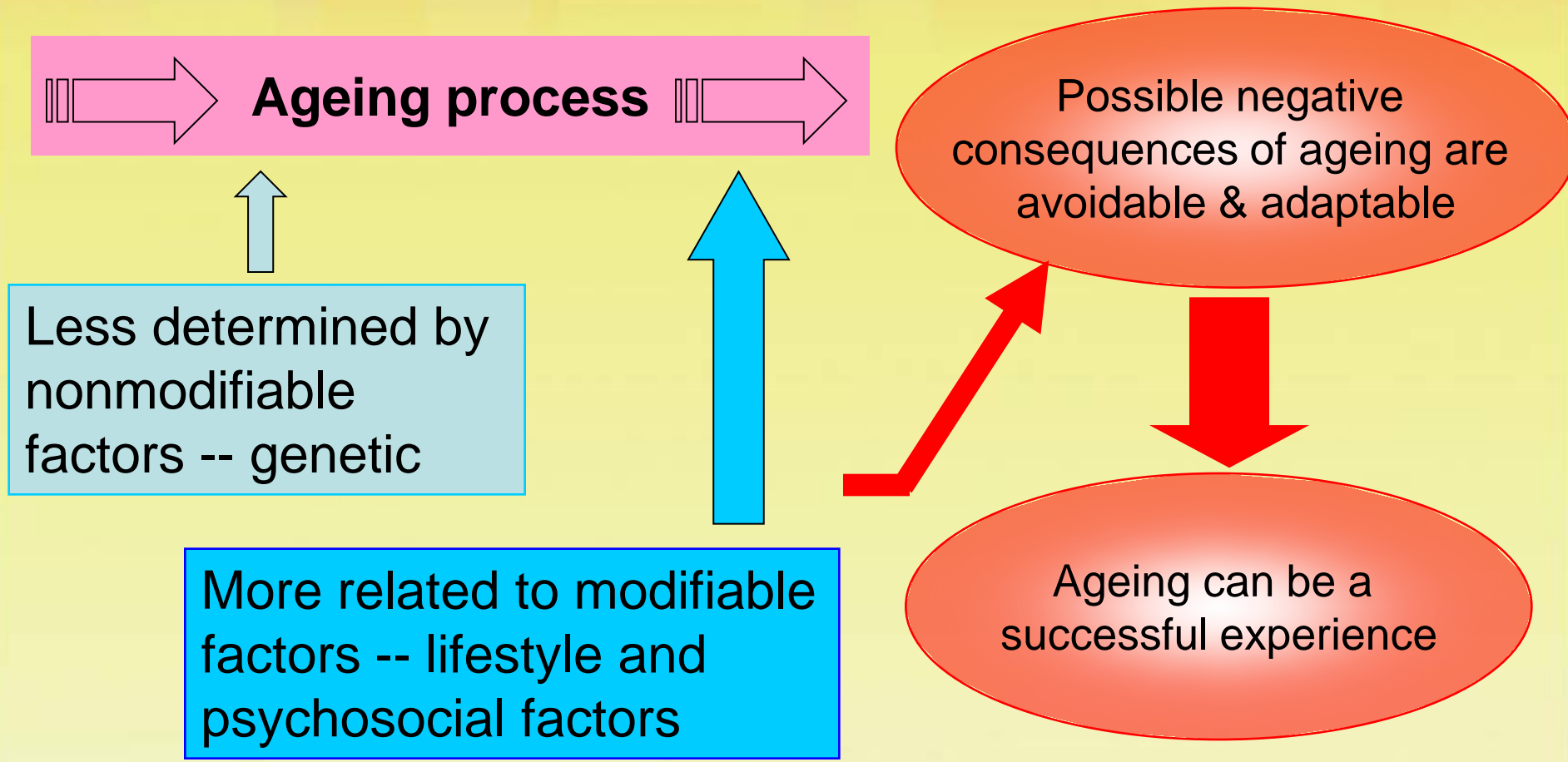
a term developed to debunk the negative myths of ageing



Examples:

- Ø *aging is all downhill*
- Ø *older adults suffer from poor physical health*
- Ø *older adults are more depressed than younger people*
- Ø *social contact decreases with increasing age*

Beliefs Underlying Successful Ageing



Definitions

<i>Authors / Years</i>	<i>Definitions of Successful Ageing</i>
Havighurst, 1961	Adding a year to lifespan, life satisfaction
Rowe & Kahn, 1987	Free from disability with high cognitive, social and physical functions.
Ryff, 1982	Ideal functioning related to developmental work across life course
Gibson, 1995	Physical, psychological & social well-being
Palmore, 1995	Longevity, health, life satisfaction
Baltes, 1997	Adapted to age-related changes
Wong, 2000	Having a positive meaning and purpose in life even when one's physical health is failing

An ambiguous term with no consensus in definition.

Terminologies

Different terminologies used **interchangeably** to mean "successful ageing"

- ▶ creative ageing
- ▶ optimal ageing
- ▶ productive ageing
- ▶ active ageing
- ▶ healthy ageing
- ▶ ageing well

Creative Ageing

Stresses the role of creative thinking in building a fulfilling later life

Unexpected joy can be explored & created in later life

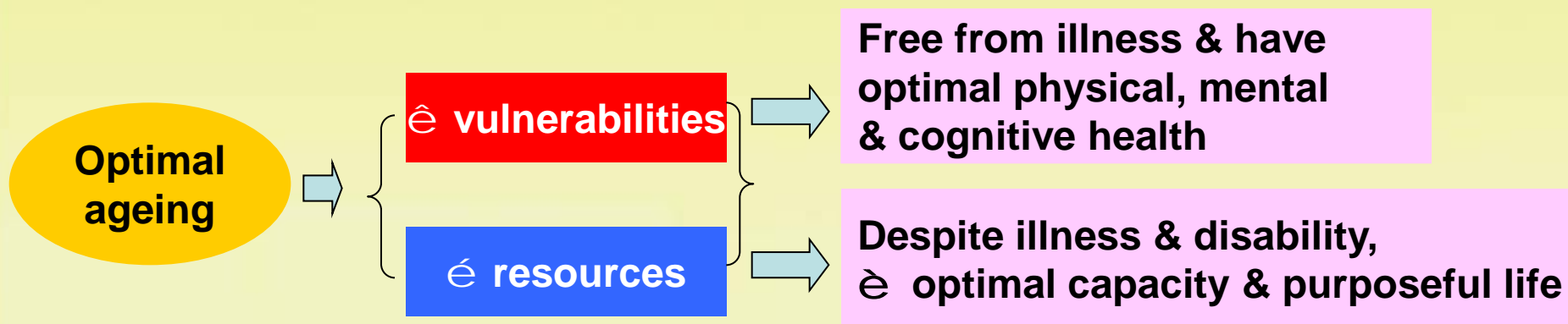


Creative thinking fills later life with:

- 4 vitality
- 4 connectedness
- 4 contentment
- 4 generosity
- 4 spaciousness

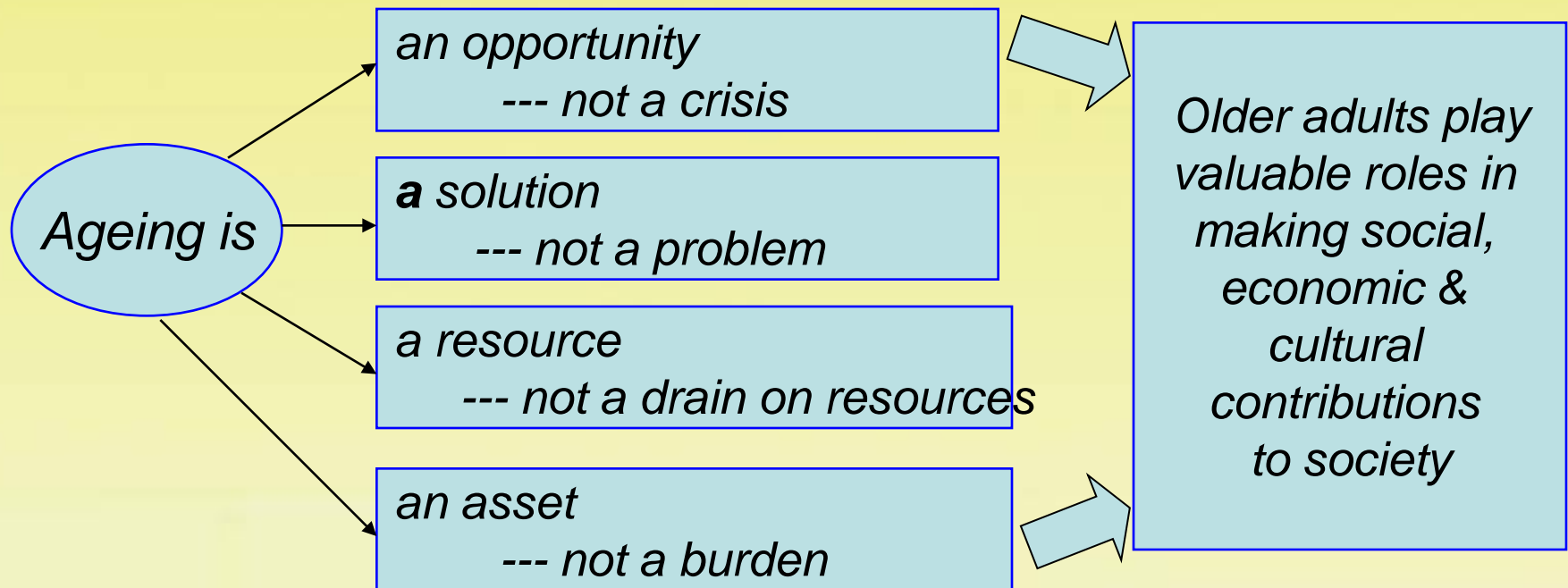
Optimal Ageing

There are different vulnerabilities & resources affecting how people age



Productive Ageing

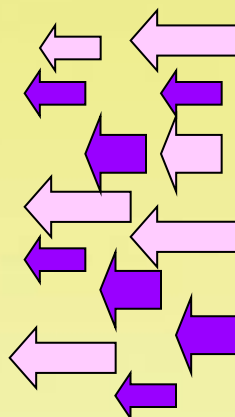
Stresses the contributions
of older people to society



Active Ageing

Stresses the importance of remaining active in building a fulfilling later life

Allows older adults to realise their potential for physical, social & mental well-being

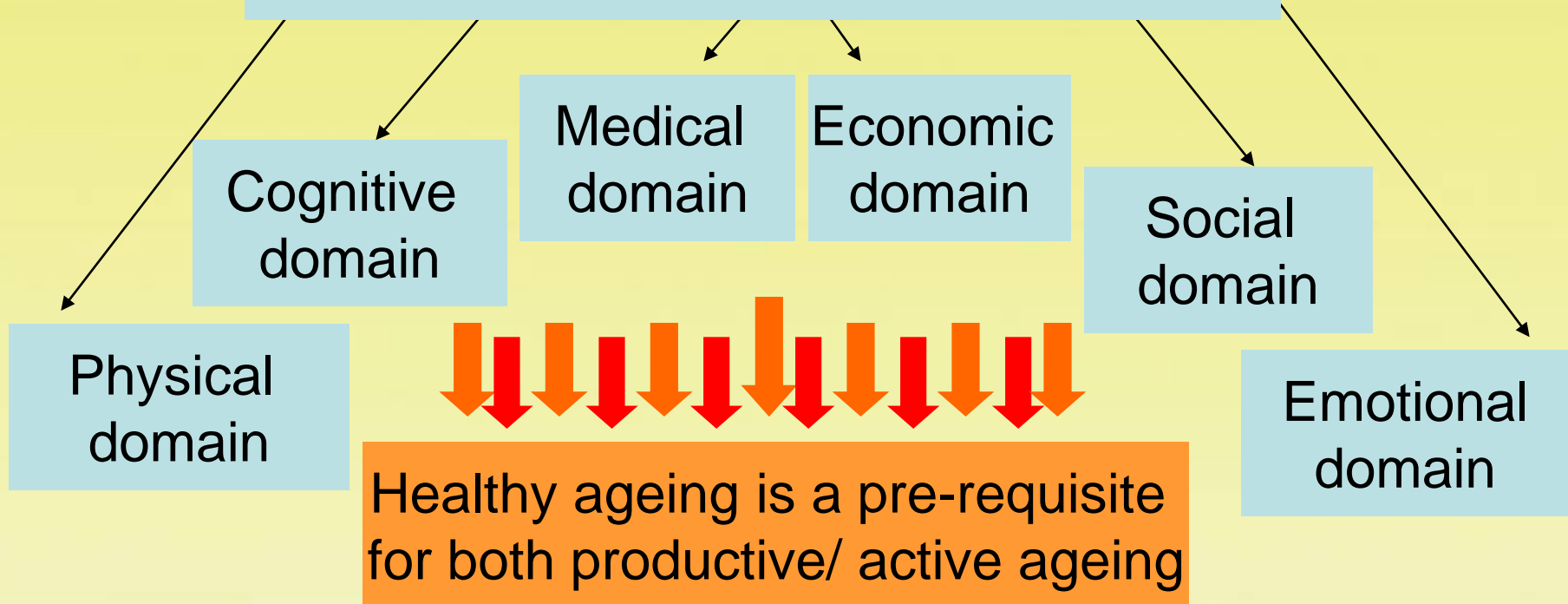


Continued participation in a wide variety of activities (social, economic, cultural, spiritual & civic) over the entire later life according to one's desire, capacity & needs but **not limited by retirement, illness/ disabilities**

An optimal quality of life

Healthy Ageing

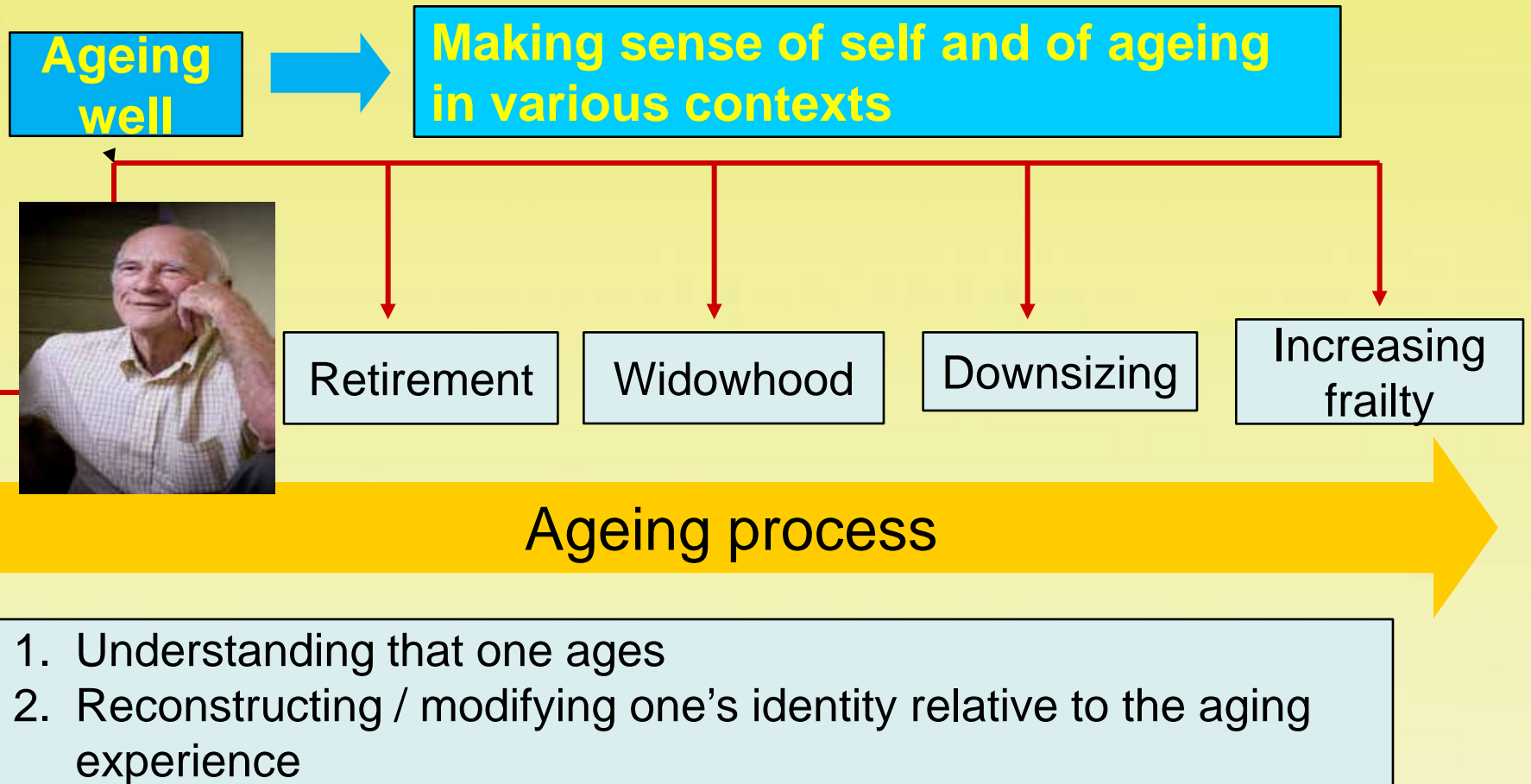
Stresses the capacity of older people to function across different domains




(Clark, 2007; O'Shea, 2006; Yaari & Goldbourt, 1998)

Ageing Well

A multi-faceted & contentious concept which has been studied since 1961. The latest concept is illustrated below:



The background of the slide features vertical stripes in shades of yellow and orange. A large, light blue speech bubble with a dark blue outline is centered on the page. Inside the speech bubble, the text is written in a blue, italicized serif font. In the top-left corner, there is a small yellow icon of a speech bubble with three horizontal lines inside.

*With regard to all these variations,
what is successful ageing ?*



Stagebridge: Healthy Ageing Programme

"The programme helps seniors stay healthier by participating in the arts. It utilises the arts to educate healthcare professionals about older people and understand how they can achieve healthy ageing."

Click the following link to find out how to achieve successful ageing through the attributes of creative thinking, optimum own capacity, making contributions, being active and healthy and ageing well:

<http://www.youtube.com/watch?v=I0c8HaMjnDI&feature=related>



Concepts and principles of successful ageing

1. Theoretical perspective
2. Concept analysis
3. Lay perspective



Theoretical Perspective

t Main ageing theories relating to successful ageing:

4 disengagement theory

4 activity theory

4 continuity theory

t Current theoretical models of successful ageing:

4 traditional & broader biomedical models of ageing

4 psychological model of ageing



Ageing Theories Relating to Successful Ageing

- 4 disengagement theory
- 4 activity theory
- 4 continuity theory

Disengagement Theory

Ageing is an inevitable mutual withdrawal or disengagement between society and older people



Personal factors:

- *Lessened capabilities*
- *Diminished interests*

Social factors:

- *Disincentives for participation*
- *Lessened opportunities*

(Cumming et al, 1960 & Cumming & Henry, 1961)



Disengagement Theory

Advantages of disengagement:

4 regulates negative emotions in later life

4 maintains satisfaction with one's performance

4 prevents depression



Disengagement Theory

Principle of successful ageing:

4 to accept losses and successfully disengage from goals that can no longer be pursued in old age

How do we successfully disengage in later life?

Disengagement Theory

According to Cumming and Henry (1961):

- t willingly retire from work or family life
- t contentedly take a relaxing life
- t pursue other solitary, passive activities
- t finally, prepare for death

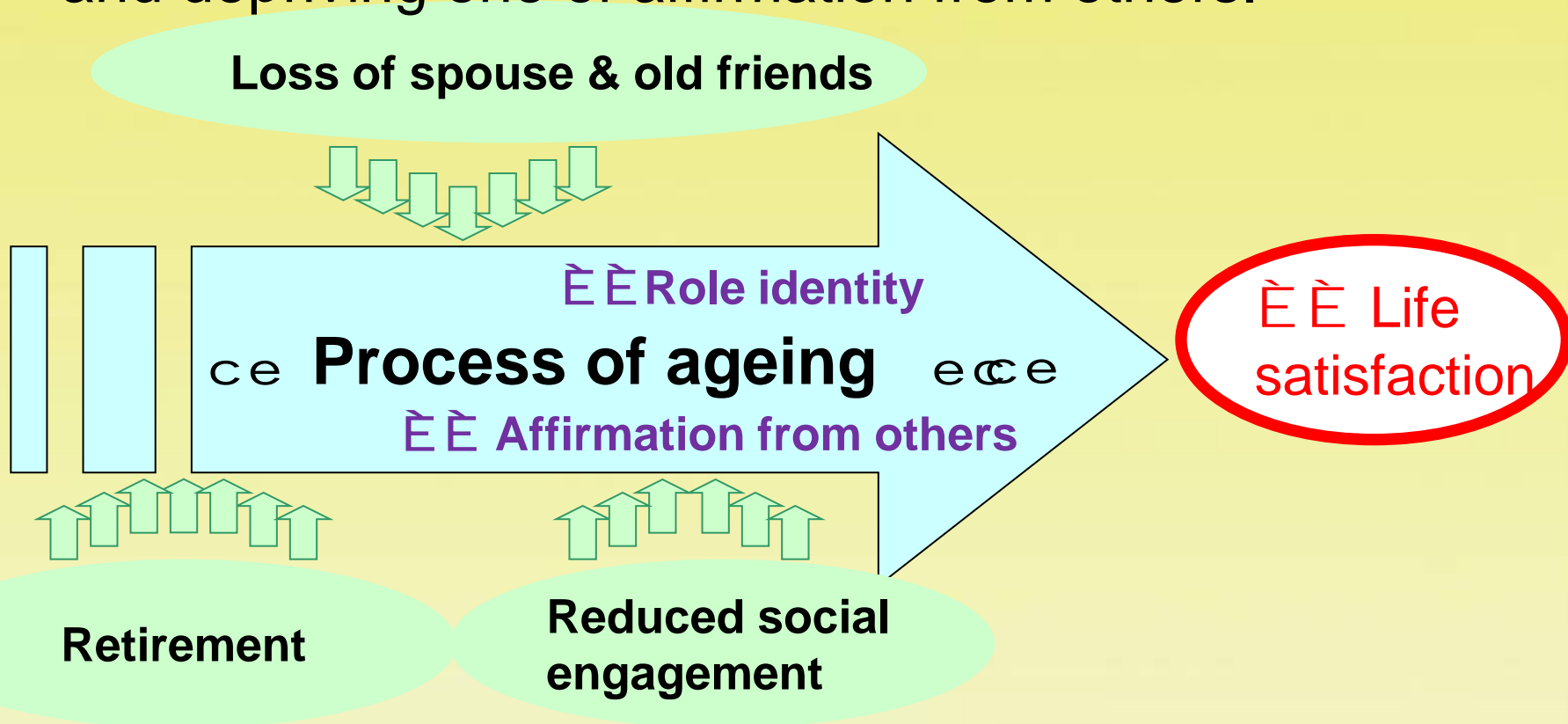


Activity Theory

- t The basic premise is that people construct ideas about themselves and get affirmation from others through engaging in various roles and activities.
- t The affirmation from self and others is crucial to maintain emotional well-being.

Activity Theory

Personal loss in the ageing process diminishes one's life satisfaction through disrupting role identity and depriving one of affirmation from others.



(Havighurst, 1957; Kossuth & Bengtson, 1988)

Activity Theory

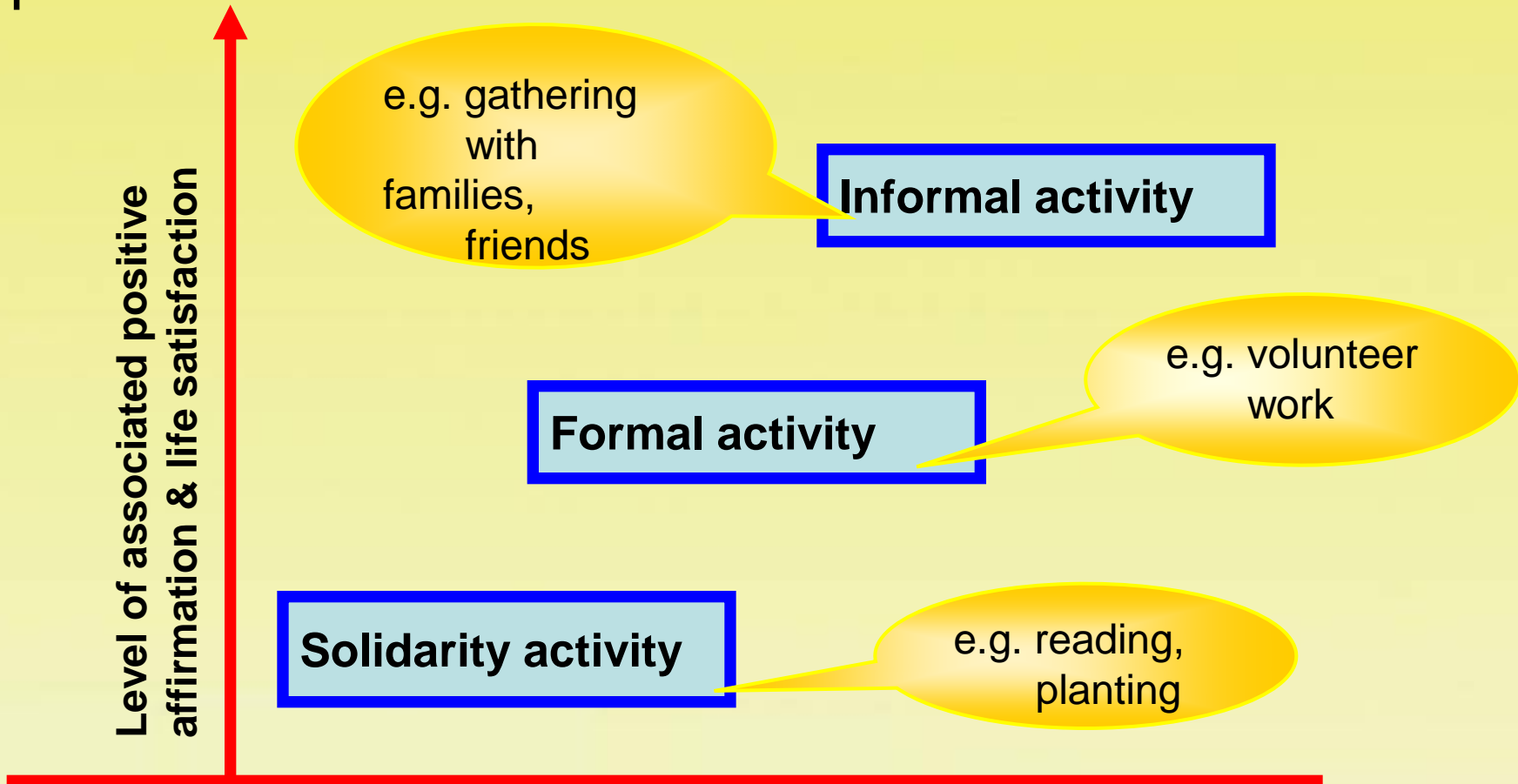
Principles of successful ageing

4 to maintain usual activities as long as possible

4 to find substitute statuses and roles for relinquished ones

Activity Theory

Different types of activities offer different levels of positive affirmation & life satisfaction.



Continuity Theory

Assumptions:

- 4 Later life does not represent a radical break with the past; changes often occur **gradually** and sometimes imperceptibly.
- 4 Ageing may associated with a lot of **physical, psychological and social** changes, but **personality, behaviours, relationship with others and self-concept of older adults** remain more or less constant with attitudes in middle age.

Continuity Theory

The assumptions imply:

- 4 Older people try to maintain continuity of lifestyles by **adapting strategies** that are connected to their past experiences.
- 4 The **coping ability** of older people depends on what they have learnt through previous life experiences.

Continuity Theory

Principle of successful ageing

4 Successful ageing depends on the degree of continuity that can be secured by older people.

How do we achieve successful ageing?

Continuity Theory

Achieving successful ageing by

4 carrying forward the habits, preferences, lifestyles and relationships from midlife into late life

4 adapting to age-related changes by well-practiced coping skills acquired earlier in life

Criticism of Disengagement Theory

- t reinforces ageism
- t the withdrawal by society is against the will & desire of the person
- t ignores individual factors (e.g. personality, goals)
- t more suitable for older members of society
 - 4 shorter life span; more disability
 - 4 strenuous work roles & mandatory retirement

Criticism of Activity Theory

- 4 does not address the physical & socio-economic barriers to elders' active participation
- 4 narrow - only advocates a single lifestyle
- 4 fails to conceive of old age as a potential developmental stage in its own right

Criticism on Continuity Theory

- 4 does not address the influence of chronic illness on the maintenance of constancy
- 4 fails to demonstrate how social institutions impact the individuals and the way they age

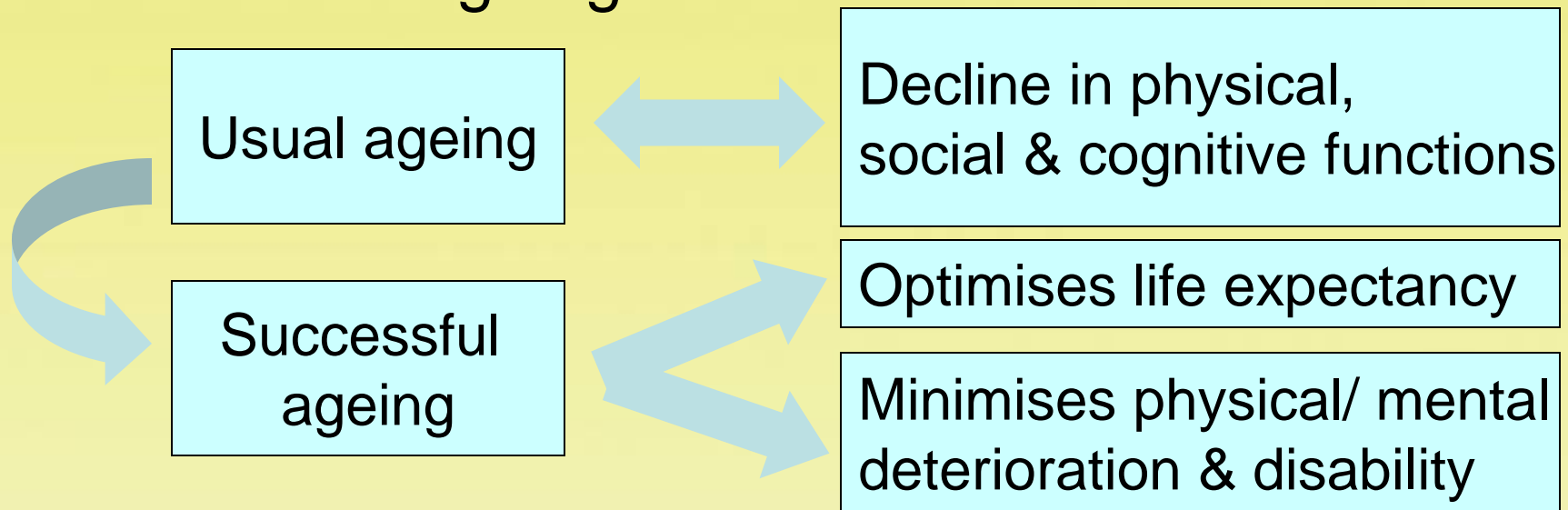
Theoretical Models of Successful Ageing

4 traditional & broader biomedical models
of ageing

4 psychological model of ageing

Traditional Bio-medical Model of Successful Ageing

Defines successful ageing from bio-medical theories of ageing



Critique:
successful ageing is confined to people without illness.

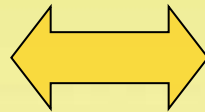
Traditional Biomedical Model of Successful Ageing - Case Illustration

Mr. Tam is a 75-year-old stroke survivor. He ambulates with wheelchair and has adjusted very well to the consequences of the disease. He maintains good social functions with family and works as volunteer in a elderly community centre.

Do you think Mr. Tam achieved successful aging?

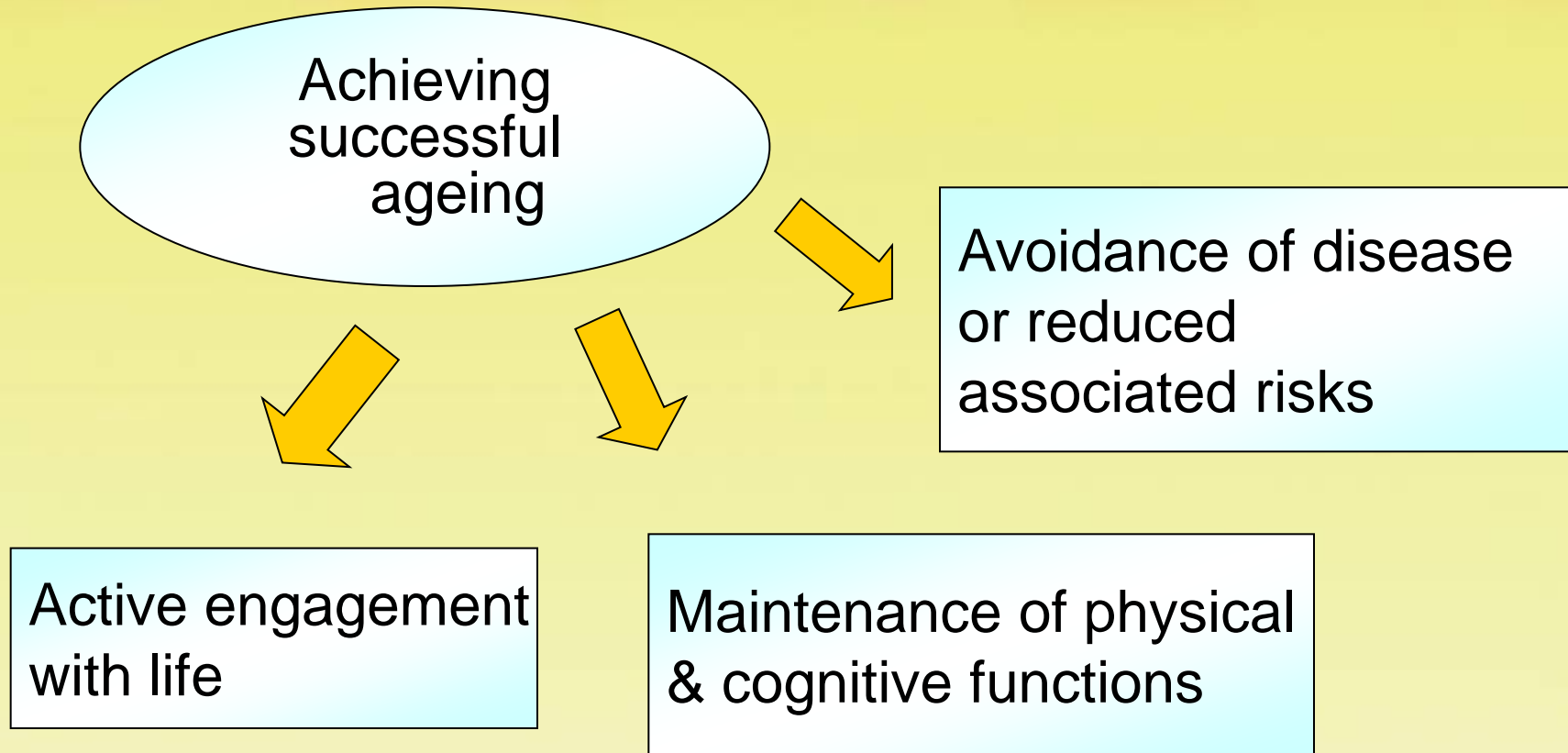
Broader Biomedical Model of Successful Ageing

Successful ageing



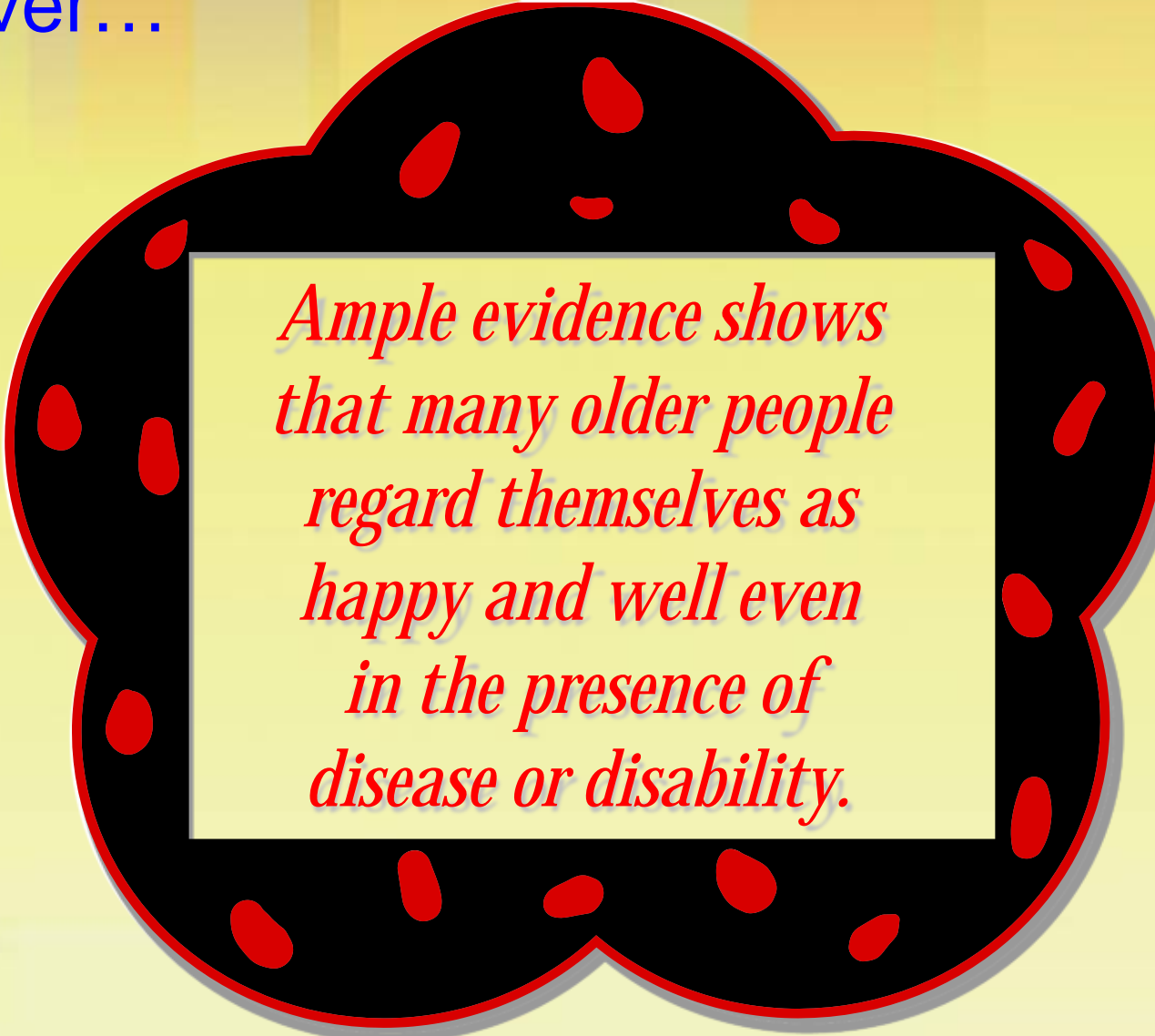
- ∅ optimal life expectancy
- ∅ minimal physical/ mental deterioration & disability
- ∅ minimal functional loss associated with ageing
- ∅ the absence of chronic disease & of risk factors for disease
- ∅ good health
- ∅ high level of independence

Most Widely Used Biomedical Model of Successful Ageing



(Rowe & Kahn, 1999)

However...



*Ample evidence shows
that many older people
regard themselves as
happy and well even
in the presence of
disease or disability.*

Psychological Model of Successful Ageing

Focused on possession of psychological resources in determining successful ageing.

Psychological resources

Personal growth

Creativity

Independence

Self-efficacy

Autonomy

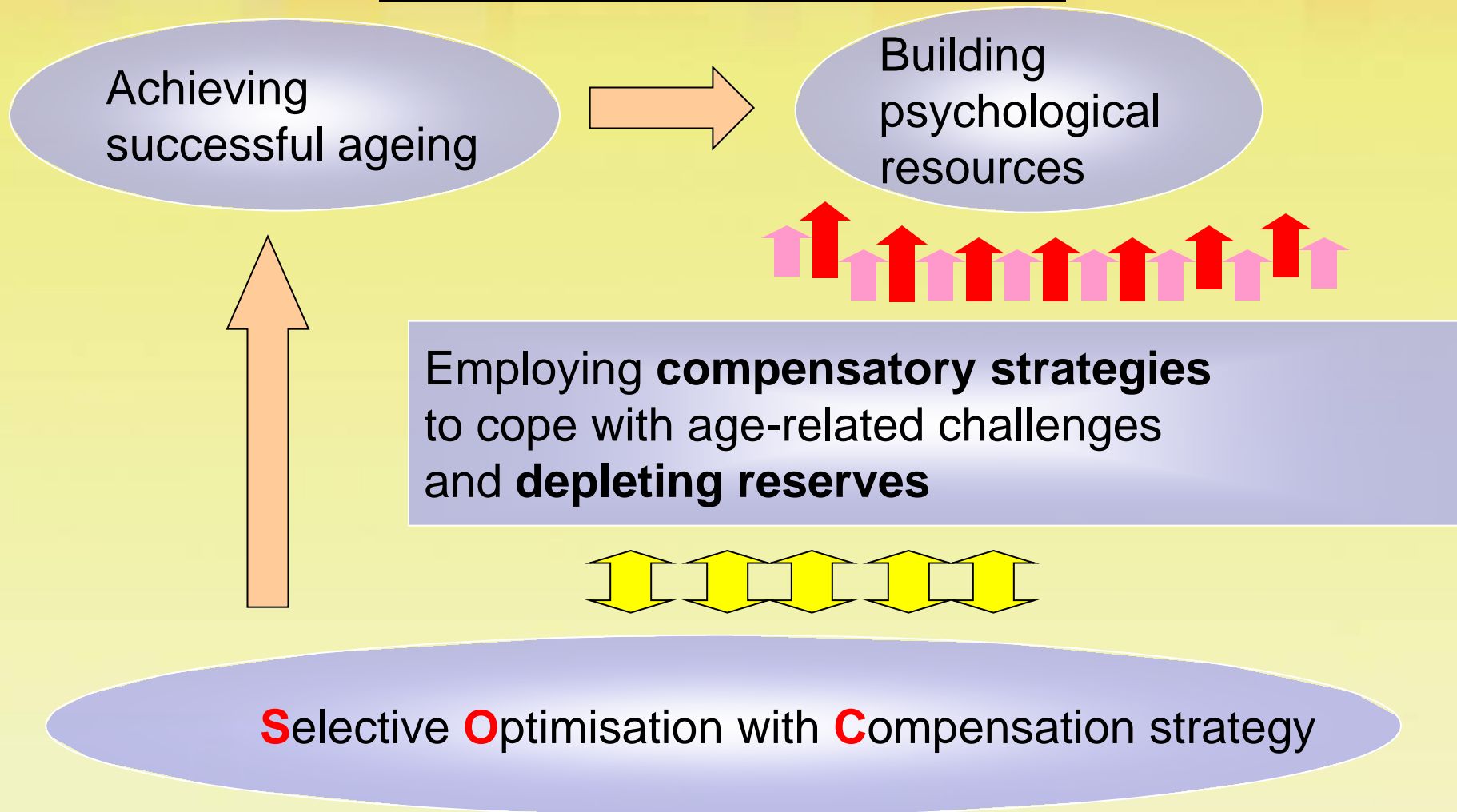
Self-worth

Effective coping

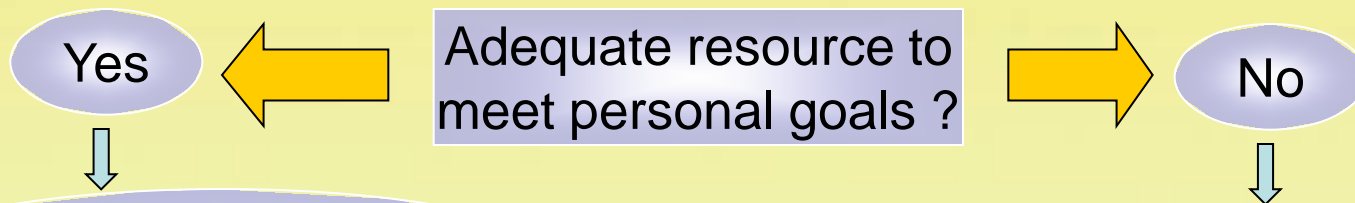
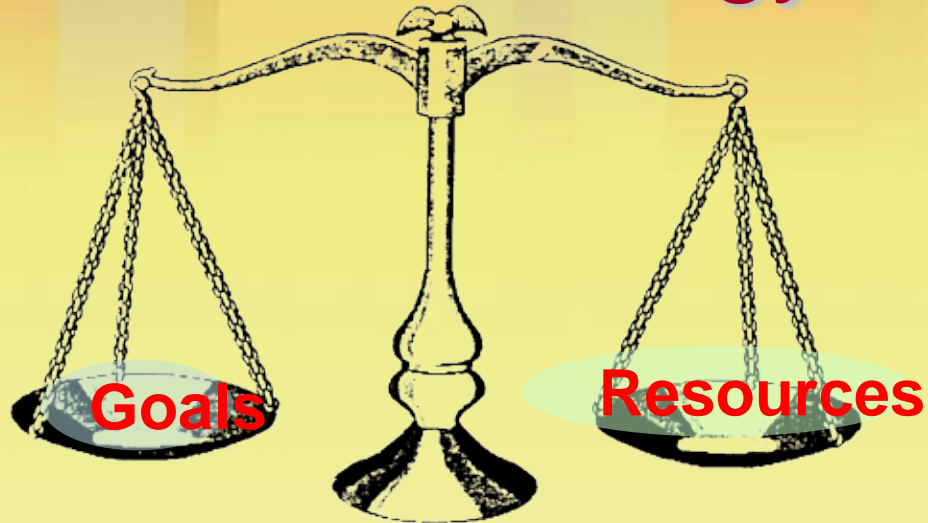
Self-acceptance

Sense of purpose

Psychological Model of Successful Ageing



SOC Strategy



change the environment to fit personal goals

change the goals to fit the personal resource

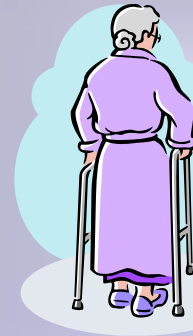
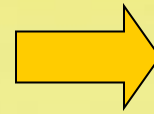
Assimilative strategy

Accommodative strategy

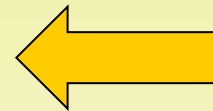
SOC Strategy: Case Illustration



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



One day, she slipped and fell, sustaining a hip fracture which necessitated a walking aid for ambulation.

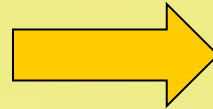


She continues her grandparent role through other activities (e.g. knitting sweaters)

She cannot take care of her grandson as she did in the premorbid state.

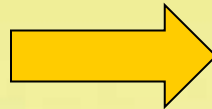
SOC Strategy: Case Explanation

Select an important life domain to define a goal



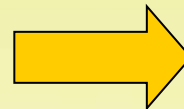
Grandparent role

Optimise resources to facilitate success in the domain



Invests time & energy to take care of her grandchild

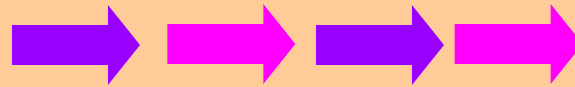
Compensate for loss in that domain to ensure optimal adaptation to changes & challenges in the ageing process



Knitting sweaters for the grandchild after fracture

Psychological Model of Successful Ageing

Successful ageing is a **dynamic** process



Achieve a realistic & practical sense of self



Accommodative strategy

Compensate for Inevitable loss in ageing process

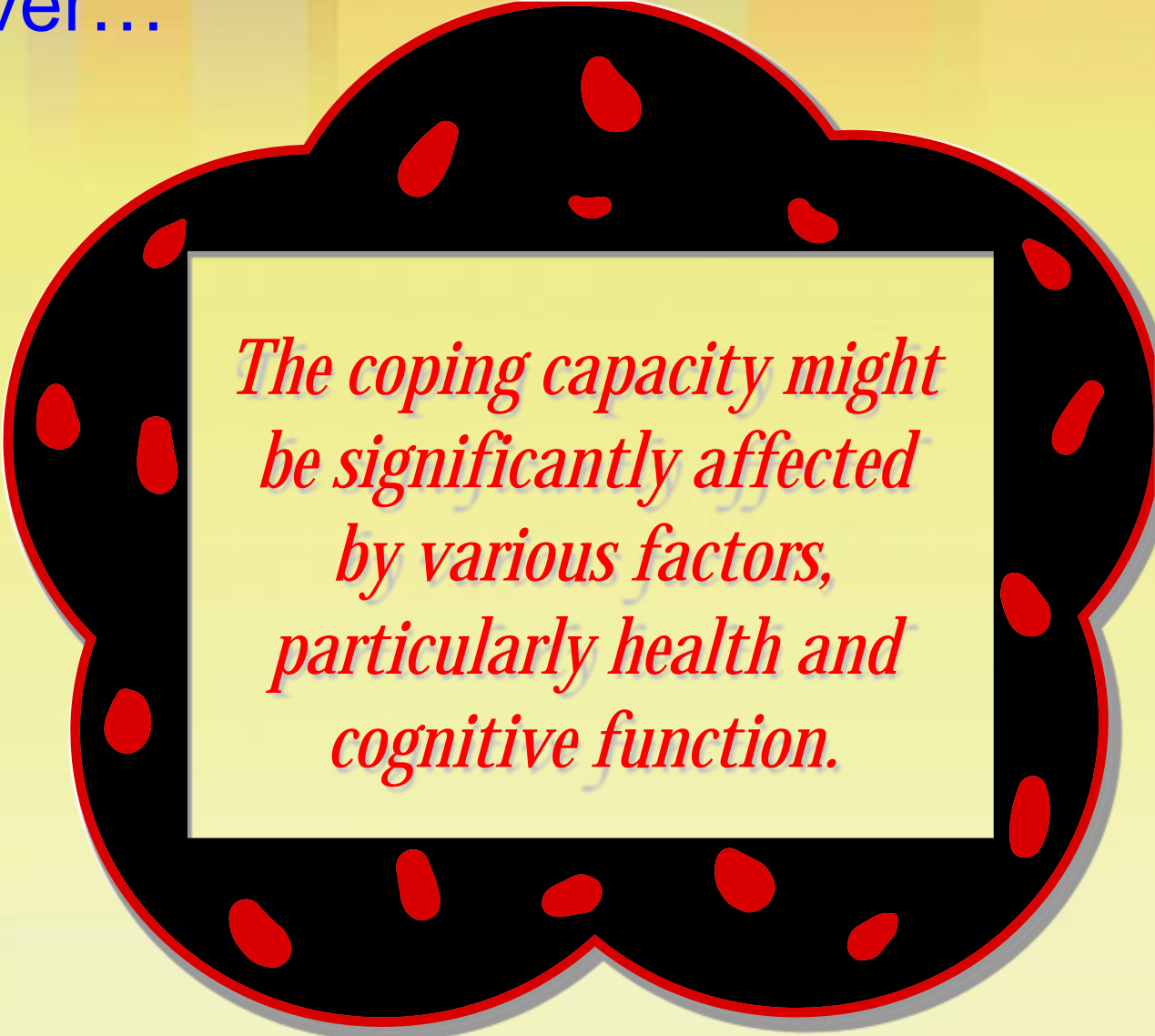
Underlying process requires a balance between

Assimilative strategy

Secure & maintain important life goal

Adjust goal flexibly

However...



*The coping capacity might
be significantly affected
by various factors,
particularly health and
cognitive function.*

Concept Analysis on Successful Ageing

Antecedents

4 opportunity to age

4 live long enough to experience the cumulative changes associated with the ageing process and the possibility of achieving a favourable outcome

4 possess the cognitive ability to evaluate one's own life

(Flood, 2002)

Concept Analysis on Successful Ageing

Consequences

- 4 acceptance of one's own life
- 4 ability remain active physically, psychologically and socially to the extent desired by the aged person
- 4 ability to comfortably anticipate what lies beyond
- 4 confront the prospect of death

(Flood, 2002)

Concept Analysis on Successful Ageing

Defining attributes

4 desired or favourable outcomes

4 cumulative changes associated with physical deterioration

4 purpose and meaning of life

(Flood, 2002)

Concept Analysis on Successful Ageing

Model case

Mrs. Au is 75 years old and a survivor of lung cancer after chemotherapy. Her goal is to survive at least 5 more years. Although she cope with daily arthritic pain, Mrs. Au always meets many friends and family and actively participates in volunteer work. She states that her purpose in life is teaching drawing to children.

Concept Analysis on Successful Ageing

Conceptual definition

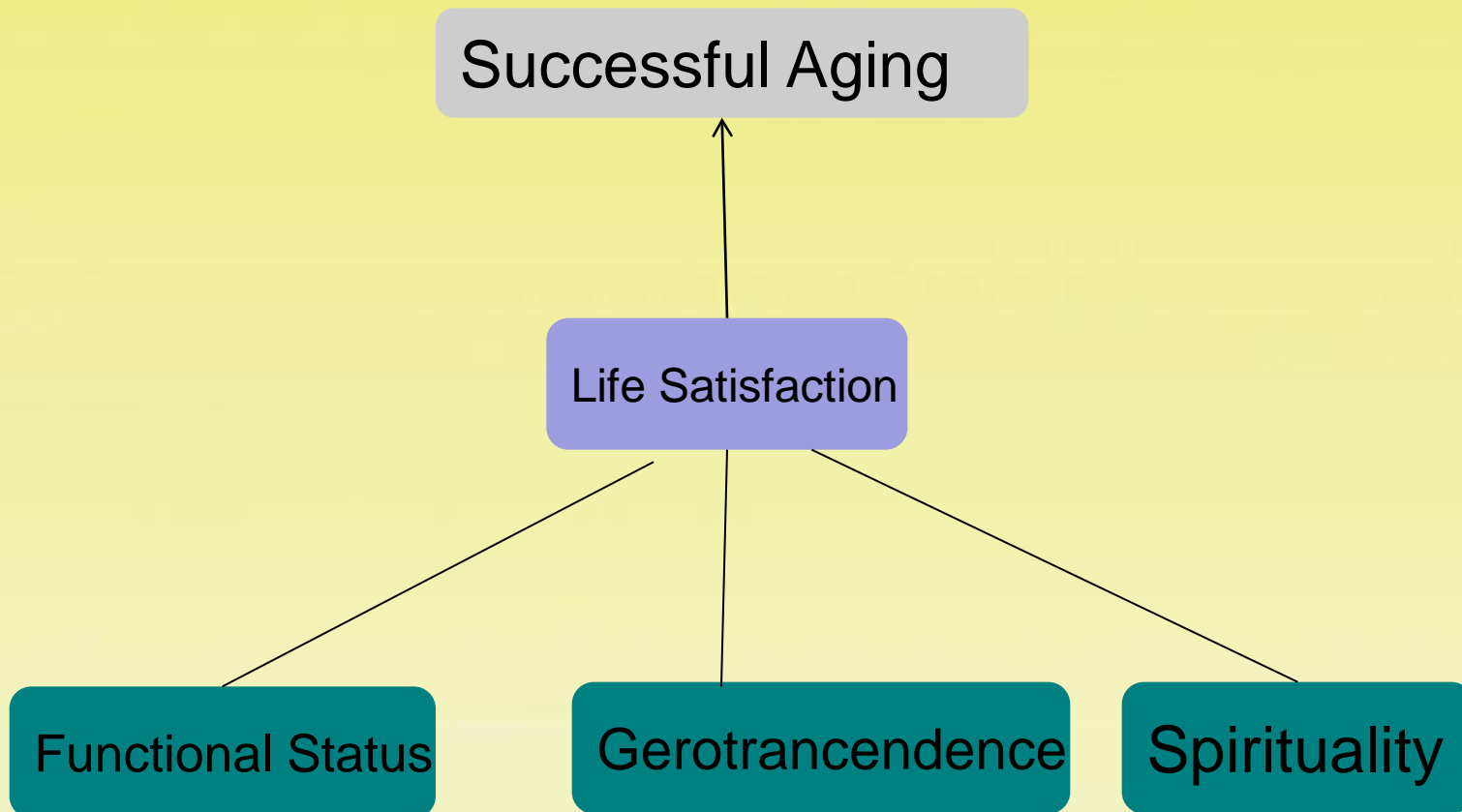
"The foundational elements are **functional status, spirituality, and gerotranscendence.**

To achieve successful ageing, individuals ought to have satisfactory fulfillment within each dimension so as to experience life satisfaction, meaning and purpose in life."

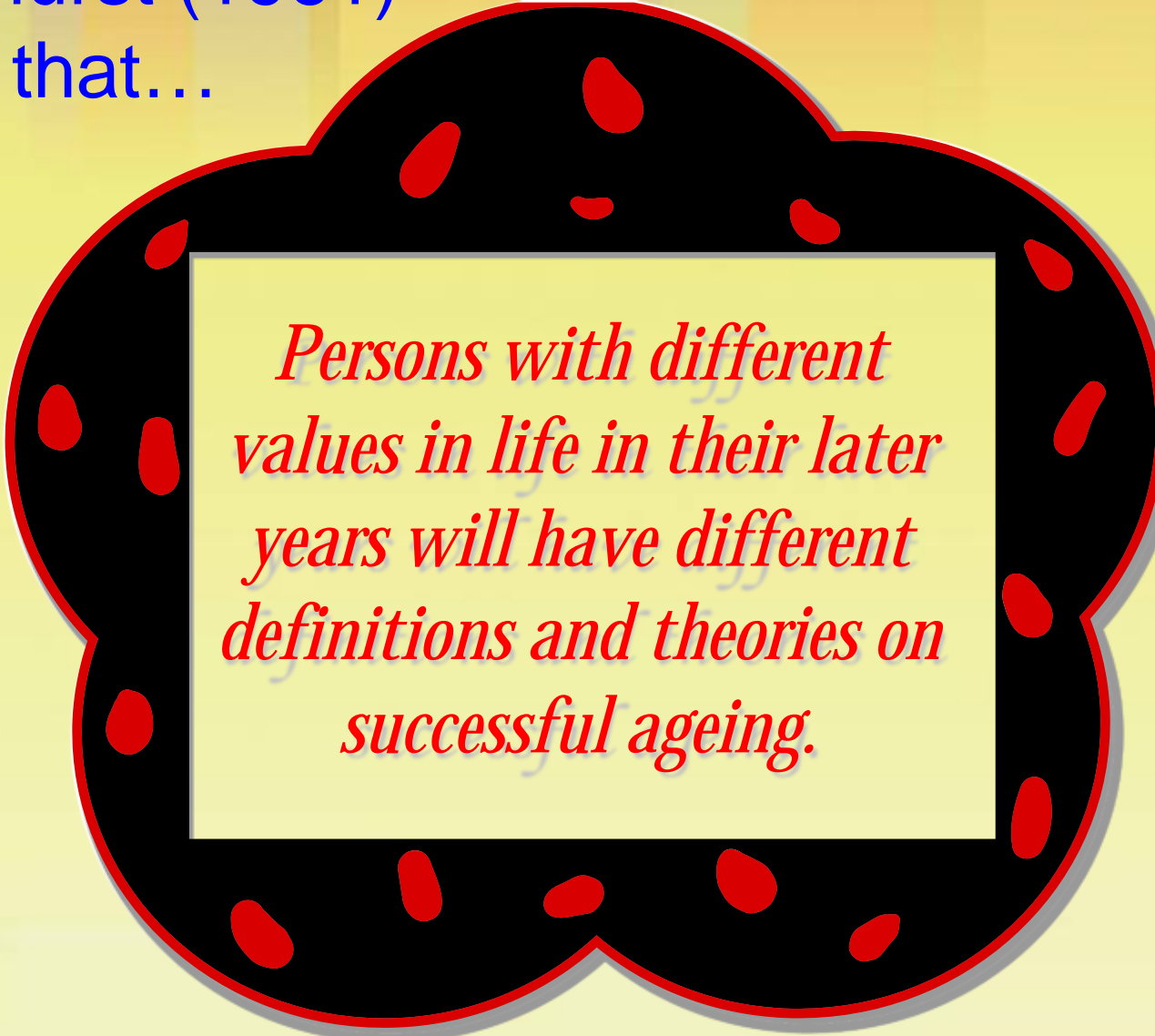
(Flood, 2002)

Concept Analysis on Successful Ageing

Conceptual diagram



Havighurst (1961)
states that...



*Persons with different
values in life in their later
years will have different
definitions and theories on
successful ageing.*

Lay Perspective on Successful Ageing

- 4 the meaning of successful ageing through the eyes of a layperson
- 4 emphasis on social reality in studying this phenomenon
- 4 developed from research and feedback from lay persons

Lay Perspective on Successful Ageing

Why do we take account of the lay view?



3. Ensure strategies for promoting successful ageing are relevant to the needs of users



1. Expectations of ageing experience are constructed by an individual's beliefs and values developed from their social and cultural schemata.

2. Incorporate professional & lay views ensure a more comprehensive model for promoting successful ageing

Lay Perspective on Successful Ageing

Developed from research data obtained from laypersons

t Methods:

4 Qualitative inquiry

–to explore how people perceive 'successful ageing'

4 Quantitative methods

–to identify the predictors and constituents of successful ageing

Washington Research on Lay View of Successful Ageing

4 A survey was conducted in Washington to compare the lay view of successful ageing and those attributes found in literature

4 Sample: 1890 cognitively intact, community-dwelling older adults completed questionnaires

4 Result: there were similarities & differences between lay views and information from literature

Washington Research on Lay View of Successful Ageing

> **80%** older adults agreed with the following attributes from literature:

Physical



Good health

Functional



Able to take care of themselves

Mental



Satisfied with life
Able to make choice & cope with challenges
Meeting individual needs
Feeling good about themselves
Able to follow individual standards & values

Social



Having friends & families around them

Canadian Research on Lay View of Successful Ageing

4 Another survey was conducted in Canada to explore how older adults define successful ageing

4 Sample: 1821 older male adults completed a questionnaire

4 Results: successful ageing was multi-dimensional, with four frequently identified domains

(Tate et al., 2003)

Canadian Research on Lay View of Successful Ageing

Four domains of successful ageing

Social relationships

*A loving spouse,
family & friends*

Physical status

*Good health
Less pain
Physically active*

**Successful
ageing**



Functional status

*Independence in
leading a normal life*

Mental status

*Happiness
Enjoy life
Unconcerned about
Retirement, Positive
outlook, attitude
Interest in life*

Taiwanese Research on Lay View of Successful Ageing

4 A survey in Taiwan explored the essential components of successful ageing

4 Sample: 584 older adults from different geographic areas in Taiwan were interviewed to determine what successful ageing meant from their perspective

(Hsu, 2007)

Taiwanese Research on Lay View of Successful Ageing

Results:

- 4 six dimensions were identified
- 4 four of them were not mentioned in Western literature
- 4 therefore there are different perspectives in successful ageing in different cultures

(Hsu, 2007)

Taiwanese Research on Lay View of Successful Ageing

The six dimensions (*Content in red is not reported in Western literature)

1. Physical health
&
independence

Be healthy & move anywhere
Able to take care of oneself & spouse
**Not being family burden and children don't have to worry*

2. *Spiritual well-being*
(incorporating 'mental health'
in Western literature)

A happy, peaceful & tolerable life
**Accept everything in life as normal*
**Live an unconstrained life with no obligations in a rural free-style*
**Don't harbour bad intentions or hurt others*

Taiwanese Research on Lay View of Successful Ageing

The six dimensions (*Content in red is not found in Western literature)

3. Family & social support

Be supported & *live* with children
Children are filial; listen to them and care about them
* *Harmony across the whole family*
* *Don't worry about offspring*

4. *Economic security*

Have enough for living expenses

(Hsu, 2007)

Taiwanese Research on Lay View of Successful Ageing

The six dimensions (*Content in red is not found in Western literature)

5. *Engagement in life*



*Live a meaningful & fulfilling life
Have an interest or leisure activity
Keep working and participate in social groups
Help others*

6. *Environment & Social policy*



*A peaceful social environment with restrained political activity
Free medical care with improved welfare for older adults*

(Hsu, 2007)

Research on Lay Perspective of Successful Ageing

Why does the lay view differ in Chinese and Western literature?

- 4 Chinese culture emphasises **filial piety** and living with children
- 4 Chinese people value **inter-dependence** at both family and society levels
- 4 Taiwanese older adults **experienced poverty & hardship during their youth** and may still harbour such worries now
- 4 Considering the social and political aspects, **Taiwan's changing attitudes towards supporting parents** may prompt older people to be more concerned about how social policy can support them in later life

Research on Lay Perspective of Successful Ageing

4 Findings in Taiwan were echoed by two further studies done in Shanghai & Hong Kong

4 Sample:

- Shanghai: 1640 older adults
- Hong Kong: 1106 older adults

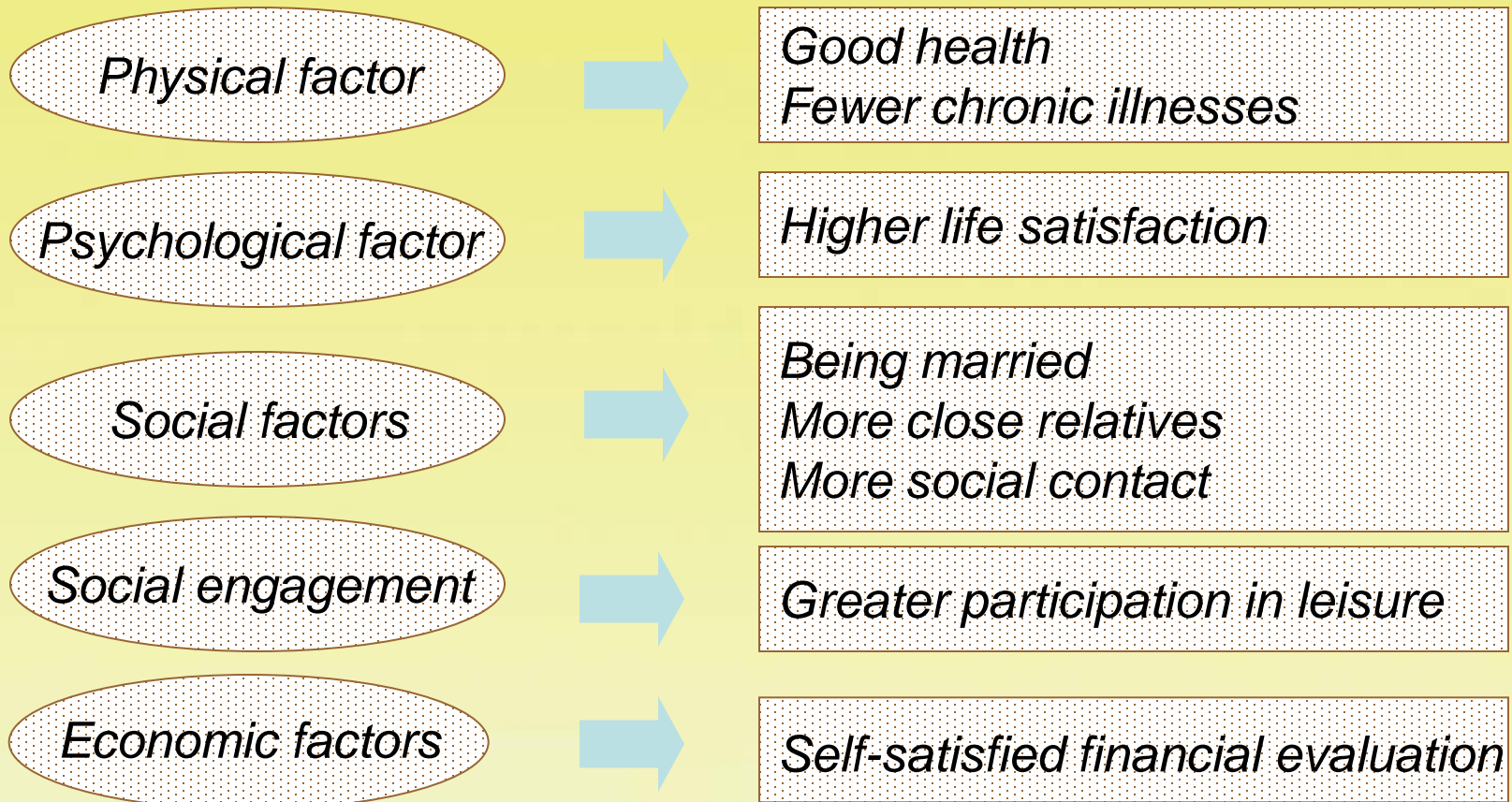
4 Result:

- The predictors of successful ageing from the perspective of community-dwelling older people were identified.

(Chou & Chi, 2002; Li et al., 2006)

Research on Lay Perspective of Successful Ageing

Successful ageing was predicted by



Hong Kong Research on Lay View of Successful Aging

4 Further explore the importance of cultural factor in the chinese cultural context

4 Sample:

- Hong Kong: 2,970 Hong Kong Chinese (40-74 years)

4 Result:

- Social engagement (caring for young ones and for elders in the family) and Productive engagement (continue to contribute to society) are distinct in Chinese culture

(NG et al., 2011)

Lay Perspective of Successful Ageing

Constituents of lay perspective that are not captured adequately by theoretical perspective:

- 4 accomplishments
- 4 enjoyment of diet
- 4 financial security
- 4 neighbourhood
- 4 physical appearance
- 4 productivity & contribution to life
- 4 sense of humour
- 4 spirituality

(Bowling & Dieppe, 2005)

Implications of Lay Perspective

Lay view

4 is not represented by a single theoretical model

4 reflects an integration of theoretical views

4 defines successful ageing

- as a multi-dimensional construct
- as constructed by cultural values & beliefs
- as influenced by social contexts

Lay Perspective on Successful Ageing in Hong Kong

Click the following link to read stories
of older people in Hong Kong:

[Video: Golden Age, RTHK](#)牛燕鄴璜甌犬

Principles of promoting successful ageing

1. Need for a comprehensive assessment of the **expectations** of older adults concerning the ageing experience.

2. **Strategies** to promote successful aging need to be
 - ô **multi-dimensional** to address the various components of successful ageing

 - ô **culturally and contextually specific** to the concerned older population

 - ô implemented at **individual, family & community** levels

3. **Strategies** to promote successful ageing aim to:

- Ô **optimise resources** in the internal (psychological) and external (social) environments in coping with age-related changes and crisis
- Ô **match role fulfillment** with physical condition and **role expectation** of older people
- Ô **secure the strengths** in midlife and help older people use them to cope with age-related challenges
- Ô consider **both remedial and / or preventive interventions**

Examples in Promoting Successful Ageing (1)

Hong Kong Elder Academies at Tertiary Institutions

Source: Elder Academies at Tertiary Institutions, Labor & Welfare Bureau & Elderly Commission

<http://www.elderacademy.org.hk/en/institution/index.html>

European Commission - EHLE Project

Source: Empowering Health Learning for the Elderly project

<http://www.ehle-project.eu/>

Examples in Promoting Successful Ageing (2)

*Hong Kong
Health Promotion*

Source: The H.K. Council of Social Service

<http://www.clp-care.com.hk/index-cn.html>

*U.S.A.
Wellness Program*

Source: Administration of Aging: Health, Prevention, and Wellness Program

http://www.aoa.gov/AoARoot/AoA_Programs/HPW/index.aspx

Examples in Promoting Successful Ageing (3)

Hong Kong Senior Employment

Source: Gingko House

Video: Gingko House, ATV

USA

Active Ageing Award

Source: US Environmental Protection Agency: Aging Initiative

<http://www.epa.gov/aging/bhc/awards/2010/index.html>

Examples in Promoting Successful Ageing (4)

Hong Kong Elder Volunteers

Source: The H.K. Council of Social Service

<http://www.hkcss.org.hk/el/publication.htm>

UK Senior Newsletter (Edited by Senior Citizens)

Source: Cherwell Council District, Seniors' Group Newsletter

<http://www.cherwell-dc.gov.uk/index.cfm?articleid=3103>

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