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CASE REPORT ARTICLE

IMPLEMENTATION OF A PROGRAM OF PREPARATION FOR RETIREMENT IN PUBLIC UNIVERSITY INSTITUTION

IMPLANTAÇÃO DE UM PROGRAMA DE PREPARAÇÃO PARA APOSENTADORIA EM INSTITUIÇÃO UNIVERSITÁRIA PÚBLICA

IMPLEMENTACIÓN DE UN PROGRAMA DE PREPARACIÓN PARA LA JUBILACIÓN EN INSTITUCIÓN UNIVERSITARIA PÚBLICA

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ABSTRACT

Objective: describing the experience about the implementation of a Retirement Readiness Program in a Public Higher Education Institution. **Method:** a descriptive study developed in a Public Higher Education Institution, located in northern Parana/PR, Brazil. The research project was approved by the Research Ethics Committee, CAAE n° 0149.0.268.000-10. **Results:** there were described the five steps of the program, namely: identification of pre-retirees, publicize of the program, instructional lectures, discussion groups and evaluation. It is intended that the results of this research will inspire more institutions to deploying programs aimed at workers, especially the pre-retired ones, considering that there are few companies that offer this type of strategy. **Conclusion:** the PPAs assist workers in making necessary decisions in this stage of life, resulting in a higher quality of life and satisfaction in retirement. **Descriptors:** Retirement; Workers' Health; Human Resources Training; Aging.

RESUMO

Objetivo: descrever a experiência sobre a implantação de um Programa de Preparação para Aposentadoria em uma Instituição Universitária Pública. **Método:** estudo descritivo desenvolvido em uma Instituição Universitária Pública, localizada no norte do Paraná/PR, Brasil. O projeto de pesquisa foi aprovado pelo Comitê de Ética em Pesquisa, CAAE n° 0149.0.268.000-10. **Resultados:** foram descritas as cinco etapas do programa, sendo elas: identificação dos pré-aposentados, divulgação do programa, palestras instrucionais, grupos de reflexão e avaliação do programa. Pretende-se que os resultados dessa pesquisa sirvam de inspiração para que mais instituições implantem programas voltados ao trabalhador, em especial ao pré-aposentado, considerando que ainda são poucas as empresas que ofertam este tipo de estratégia. **Conclusão:** os PPAs auxiliam os trabalhadores nas tomadas de decisões necessárias nessa etapa da vida, resultando em maior qualidade de vida e satisfação na aposentadoria. **Descritores:** Aposentadoria; Saúde do Trabalhador; Formação de Recursos Humanos; Envelhecimento.

RESUMEN

Objetivo: describir la experiencia acerca de la implementación de un Programa de Preparación para el Retiro en una Institución Pública de Educación Superior. **Método:** es un estudio descriptivo desarrollado en una Institución Pública de Educación Superior, ubicada en el norte de Paraná/PR, Brasil. El proyecto de investigación fue aprobado por el Comité de Ética en la Investigación, CAAE n° 0149.0.268.000-10. **Resultados:** fueron descritos los cinco pasos del programa, a saber: la identificación de los pre-jubilados, dar a conocer el programa, conferencias educacionales, grupos de discusión y evaluación. Se pretende que los resultados de esta investigación inspirarán más instituciones para implementar programas dirigidos a los trabajadores, especialmente a pre-jubilados, teniendo en cuenta que son pocas las empresas que ofrecen este tipo de estrategia. **Conclusión:** los PPA ayudan a los trabajadores en la toma de decisiones necesarias en esta etapa de la vida, lo que resulta en una mayor calidad de vida y satisfacción en la jubilación. **Descriptor:** Jubilación; Salud del Trabajador; Formación de Recursos Humanos; Envejecimiento.

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INTRODUCTION

The increase in life expectancy, due to the progressive advances in science resulted in a change in the age structure, represented by the significant growth of the elderly population. Longevity constitutes one of the major challenges of the twenty-first century, especially with regard to the quality of life of aging people.¹

The Brazilian Institute of Geography and Statistics (IBGE)² published in 2010 about the extension of the top Brazilian age pyramid, with the population growth in the share aged 65 or older, which was 4,8% in 1991, from to 5,9% in 2000 and reaching 7,4% in 2010. Thus, the absolute growth of the population in the 2000s was mainly, due to the increase of the adult and elderly population.

The projections of this phenomenon indicate that in 2020 Brazil will be the sixth country in the world in number of elderly with a higher quota to 30 million people, which will result in implications of demographic, economic and social order, causing changes in the lives of individuals, family structures, the composition of the workforce, among other.³⁻⁴

These projections show that men will remain longer in the labor, which in most cases is more than a means of subsistence, that is, is the basis for construction of their identity, occupying a large space in personal and social life, causing a sensation completeness.⁵ All this coupled to an active aging that is a process which should allow the optimization of health opportunities, social participation and security, promoting a better quality of life.⁶

The retired designation can bring to the person a range of implications, which can be a positive or a negative order. For many retirement is considered a reward to the extent that the person is released from work, see diminished their responsibilities and receive a financial award for their struggle as an employee, get a sense of accomplishment, and this is a time to enjoy life, to rest and reap the rewards. However, aspects not so positive about the retirement comes up, as the lack of having a daily commitment, loss of social identity, the relationship commonly performed between retirement and old age, fear of inactive label, old and useless, loss of status, the fear of the appearance of disease and even death.⁷

The Preparation Program for Retirement (PPA) provide conditions for the worker may plan and prepare for the changes that will come with retirement, as it provides relevant

information in the process of making decisions about the future, contributing to the prevention of difficulties due to retirement. The development of these programs in addition to providing benefits to participants, favors the organization in relation to their image and social action, becoming an important management tool.^{5,8}

Programs like this little adopted by the institutions, even with Law 8842 of 1994, in Chapter IV, Art. 10, establishes as a matter for public bodies and entities, among other things, the creation and maintenance of stimulus preparation programs for retirement the public and private sectors.⁹ Still regarding legislation, the Elderly addresses this issue in Chapter VI of Professionalization and Work, Art. 28, indicating that the Government will create and encourage workers preparation programs for retirement, with at least one year by means of stimulus to new social projects, according to their interests, and clarification of social rights and citizenship.¹⁰

Despite this legal contribution, an investigation in 320 Brazilian organizations showed that only 18% took what PPA.¹¹ Another study states that the lack of preparation of workers to face retirement can be a risk factor, since the absence of studies of the consequences of retiring can lead to the development of attitudes and behaviors that affect quality of life.⁵

It is emphasized that the process of preparation for retirement begins when the company decides to offer its employees an opportunity for this new phase of life more sustainable. The main objective of the preparation process is the possibility of transforming retirement at a stage in life happy, productive, entrepreneurial or director.¹²

PPA meets the key role the redefinition and reorientation of the people regarding their future,¹¹ facilitating the welfare of future retirees because emphasizes the positive aspects and provides an opportunity to reflect on the negative aspects of transition as well as the discussion of alternatives to deal with. It is the opportunity to receive and also the time to build the life plan in the short, medium and long term, prioritizing interests and attitudes necessary for the realization of personal projects, family, social, among other.¹³

This assignment to prepare workers to turn off the company, creating the conditions for transfer of knowledge, is one of the great challenges of today's organizations. The adoption of these policies can change the

dynamics of the institution, since it will bring better results for everyone involved.¹²

It is noteworthy that an employee retirement plans and set goals for themselves tend to be more controlled by future expectations rather than the feeling of being pushed out. This is one of the main arguments for the servers, the company and the governments invest in planning and preparation programs.¹⁴

Given the considerations described herein is believed in the relevance of this study, as will contributions in organizing such programs by other institutions and therefore better conditions for workers face this phase with quality of life and satisfaction, encouraging them to their planned life, and reviving the desire to live soon the situation of being retired.

This study aims to:

- Describing the experience about the implementation of a Retirement Preparation Program in a Public Higher Education Institution.

METHODOLOGY

An article from dissertation << *Social representations of employees of a public university in view of retirement* >> submitted to the Health Sciences Center, State University of Londrina/PR, Brazil, in 2013.

A descriptive study was performed in a Public Higher Education Institution in the state of Parana/PR, Brazil. That institution has a floating university community of approximately 26.115 people, distributed as follows: 5.311 servers, of all categories and links, 15.757 graduates and 5.047 Postgraduate students.

In this study, we describe the implementation of a PPA with that institution, turned to servers that were in pre-retirement age or length of service, and also for those who could already be retired.

The implementation stage of the program began after the approval of the same by the Ethics Committee of the institution, registered in the National Information System about Research Ethics, CAAE No 0149.0.268.000-10, since the program involves human beings, and because it is an educational institution, the information collected during its execution constitute important sources of research.

RESULTS AND DISCUSSION

The idea of implementing a PPA emerged from the program coordinator, nursing

faculty, which also be in the pre-retirement phase, came a few years aiming its implementation in order to providing to the workers moments of reflection on the retirement process, addressing the key questions that arise in this stage of life.

The program was implemented in 2011, starting from one of the rectory of management goals elected in 2010, based on the purpose of developing programs in partnership with the Welfare Service to the Community (Sebec) aimed at the constant pursuit of quality of life for servers the institution, including the pre-retirees.

The feasibility of preparation programs for retirement represents a significant importance, since the aging of the population is a given fact and booming. Accompanied by aging, we observe the process of physical, mental, cognitive and social losses that bring vulnerability to the worker.^{15,4}

In this sense, awareness is crucial for managers on the need to develop strategic and creative solutions to maintain the working capacity of their employees, respecting the limitations of age and valuing the knowledge and the wisdom of more experienced. It also requires the creation of new opportunities for the older and the dissemination of information to younger on existing prejudices regarding age and how to deal with intergenerational teams.^{16,17}

Since its inception, the program included the participation of teachers from the nursing program, graduates and Postgraduate students, in addition to the important partnership with the SEBEC. This sector is to promote the welfare of the university community through implementation of services and programs related to the areas of health worker and safety, among others.

The PPA constitutes an important management tool for the university and, in particular, to the SEBEC, which before the viability of the program, was already concerned about the significant aging of that institution workers, and sought ways to serve this population since they are aware of the need to prepare their employees for a healthy retirement and quality of life.

Figure 1 illustrates the steps implemented in PPA institution.

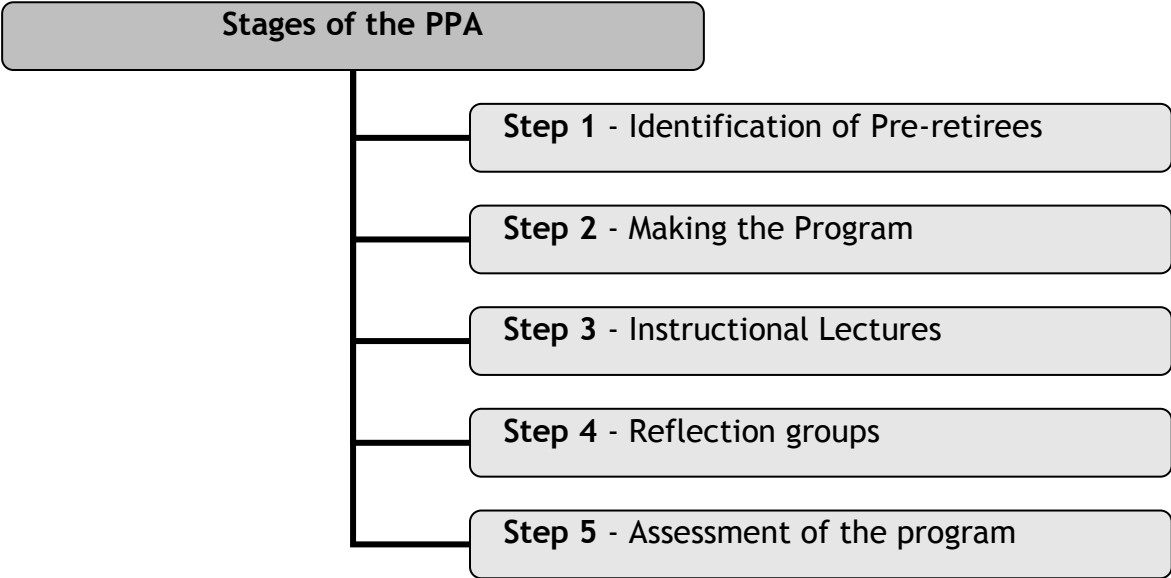


Figure 1. Stages of the Program of Preparation for Retirement of a Public University Institution. Londrina- PR, 2013.

Step 1 involved the identification of workers in pre-retirement, by requesting a list, by the Human Resources department, containing the number of these servers and additional information. These data allowed outlining the occupational profile of pre-retirees and the detection of which 1.048 (19,9%) workers were part of the group studied .¹⁸

We emphasize the importance to recognizing the workers' occupational profile, because a significant number of servers in pre-retirement, as found in this study, highlight the need to implement a PPA. The period in which these workers are is critical, because, for all evolution of ideas about the relationship between retirement and productivity, it begins to assimilating the pre-unproductive stigma, or begins to condition their old age to retirement, which is an existing behavior when the absence of a continuing education program or preparing for retirement.¹⁹

After this identification, began to step 2, characterized by the release of the PPA to all the institution's servers. At this time, the workers were informed of the implementation of the program by widely using of the university's media, intranet, e-mails, phone calls, brochures and posters, containing the objectives of the study and a phone number so that the interested could learn more about the program and the schedule and local implementation of instructional lectures.

The previous description of the program participant is not required and the server registry developed in his first participation through a list containing the name, email and telephone. Although the activities are aimed at pre-retirees, there was the participation of some servers that were not yet part of the population, but which had already shown

interest in seeking information about retirement, we were welcomed and encouraged to participate.

This time to seek for new knowledge and reflect on retirement proves important since the beginning of the career, should be understood as a process of continuing education related to the plan of life and therefore be in the interest of people of all ages.¹¹

In step 3 with instructional presentations were made biweekly frequency and duration of approximately two hours. These talks were aimed at instructing employees of the legal and economic aspects related to retirement, promotion strategies to health and improved quality of life and community resources available to retirees.

The meetings had an official speech; it was a teaching program or guest from another area, which addressed the specific topic, using active methodologies for the development of themes, which allowed participants to the constant exchange of information and clarification doubts and questions.

This approach meets the ideas of the educator and philosopher Paulo Freire when he says that "knowledge can only be developed in the very action of the individual" (p.51), making significant and lasting learning, so that the participant acquires desire to learn and become stimulated to produce knowledge itself.²⁰

Each lecture addressed a theme, as follows: 1. Experiences and Feelings in the pre-retirement: identifying the wishes and feelings that permeate this stage; 2. Social Security Legislation: addressing the main laws of interest to pre-retirees; 3. Home Economics and Citizenship: domestic economy, saving for retirement, entrepreneurship, perspectives of

the labor market in order to maintain the standard of living and financial preparation, rights and duties of the retired, volunteer work; 4. Health aspects in the pre-retirement: the importance of exercise, balanced diet, traditional forms and prevention alternatives to physical and mental health, the realization of leisure activities.

The subjects covered in these lectures are similar to those presented in other pre-retirement programs, and to discuss these topics relevant to the phase in which the worker is, which can provide better basis for coping with retirement.⁵

The lectures were evaluated by means of a previously designed instrument including the following items: appropriateness of the methodology used, relevance of topics and the impact of these on the workers' preparation for retirement.

At the end of a cycle of lectures, participants were invited to participate in step 4 of the PPA, characterized by think tanks, in order to promote discussions and reflections that could contribute to face the feelings that arise in the period preceding retirement.

Each group could have a maximum of 15 workers, and the frequency of the meetings was monthly, lasting about two hours. Twenty pre-retirees participated in this stage, being formed three groups, which remained the same participants during all meetings held in order to promoting greater interaction and complicity between them. These were coordinated by a teacher with experience in group dynamics and research on the topic of retirement; and it is in the pre-retirement phase. Many topics were addressed, emerged from the pre-retirees wishes, with a time of closest approach between the group members and the coordinator in good time to allow the exchange of experiences.

The strategy used in step 4 reaffirmed the goal of the PPA, bringing the pre-retired to his reality, making materialize your dreams and your plans for the future.⁵ Groups like this are understood by its members as self-esteem rescue scenarios, or rehabilitation, and function as spaces in which the participant is protection for the anxieties arising from losses. People identify and, therefore, are faced with coincidences, rescue desire, illusion and reactivate its history.²¹

The four steps mentioned were developed in 2011 and 2012, being held three rounds of talks and involved three focus groups. By December 2012, 120 workers participated in the activities, which motivate us to continue the program, since a large portion of servers

of the institution in pre-retirement phase remains to be achieved.

Statements of the participants emphasized the importance that the PPA represented in their lives, turning anxiety and anguish in meaning and possibility of positive moments, which brings to the organizing team motivation and the desire to draw even more daring goals for the program.

The table below shows some accounts of participants who show the foregoing:

Answering the question of what the program represented for me, I say that for me was very important, so that if it were not, there would have returned in the second meeting. Sometimes the change is huge, and sometimes it is small, but always there. (Crystal, G1)

I attended the lectures on retirement because he was looking for guidance. I believe that lectures addressing the need retirement from the company. (Quartz, G2)
For me know who has represented life in retirement, possibilities. That retirement is a good time. (Emerald, G2)

This program is like a double therapy, you go out married or separated, but does well. Here we think about very important things in our lives. Here I saw that I like my job. (Pearl, G3)

[...] Watershed [...]. The invitation to participate in the program increased my self-esteem, because I realized that I am not just a number. I found acquaintances here. The statements showed me that I can love the university, although not here. I see no need to break the bonds of friendship. (Ruby, G3)

The next steps of the team understand the continuity of the program, annually performing the steps above reported, and as step 5 will be interviewed servers that retire after his participation in the PPA, in order to assess the representativeness of the program in the retirement process and post retirement.

The institutionalization of programs like this demand some challenges to its creators, it is of an essential persistence to reach the target audience. We emphasize the need for successive approximations of this population with the team program, since for many retirees it represents a phase of difficult reflections, which can interfere with their biopsychosocial aspects, resulting in a phase of denial. These causes much delay the decision to retire and move away from activities which refer to the subject, like a preparation program for retirement.

Another challenge relates to the necessary concern in offering meetings to motivate the employee to participate in all stages of the program, representing their inquiries

experienced facing retirement, otherwise organizers of programs like this can suffer from poor adherence of those involved; Also, one must consider that there are no ready-made models of PPA to be applied, which exist are programs of different institutions and consultants who perform adjustments for each type of organization, based on the structure of each company, fitting this prepare a way and a method that best suits your needs.¹²

CONCLUSION

The PAP showed significant results for both pre- and retired to the institution. The steps 3 and 4 provided respectively informative and reflective moments, showing to the participants the need to rethinking on the life of projects aimed at the future, is continuing the work, is retiring.

It reaffirmed the importance of policies for workers' health, addressing their aging, since it is common to find workers aged in the labor market, feeling the need to stay productive and able to keep up with technology and the unbridled production the market demands.

This scenario requires managers the ability to articulate this scenario, providing the employee better working conditions, providing knowledge and information that influence positively in the work process and culminating in a satisfying retirement. In this process, the viability of policies for pre-retirement constitutes a great challenge to managers, and should be thought of from the ticket server in the company. Such programs minimize uncertainties and disappointments of retirement, and provide satisfaction and happiness with the decision making.

It is hoped that this study becomes an inspiration for most institutions, public and private ones, to deploying programs like this and thus encouraging a happy retirement and with quality of life to their servers.

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