

**Leeds
Older
People's
Forum**

**Leeds
Community
Foundation**



**Retirement and Life
Transition Workbook**
Facilitator introduction

Introducing the Retirement and Life Transition Workbook

Purpose of the Workbook

This workbook has been developed to support people who are approaching, entering or adjusting to retirement and later-life transition.

While retirement is often discussed in practical or financial terms, many people also experience important emotional and psychological changes during this stage of life. These can include questions around identity, purpose, confidence, routine, connection and wellbeing.

The workbook is designed to create space for reflection on:

- past experiences and strengths,
- the emotional impact of change,
- mental wellbeing,
- purpose and meaning,
- future hopes,
- and practical next steps.

The overall aim is to help participants think more intentionally about the next chapter of life and identify ways of supporting their wellbeing and sense of purpose moving forward.

The workbook can be used by an individual at their own pace, but can also be used in a group format with a facilitator supporting the process.

The Role of the Facilitator

Facilitators are not expected to act as counsellors or therapists.

The role is simply to:

- introduce the themes,
- create a respectful and supportive atmosphere,
- encourage reflection,
- and allow participants to engage with the material at their own pace.

The workbook is intentionally reflective. Some exercises may prompt emotional responses, memories or sensitive conversations. This is normal. Participants should never feel pressured to share personal information with the group.

Facilitators should emphasise throughout that:

- there are no right or wrong answers,
- people may complete exercises differently,
- and participants only need to share what feels comfortable.

Often the most valuable part of the process is simply giving people time and permission to think about these issues honestly.

Suggested Approach for Group Use

The resources can be used flexibly depending on the setting, timescale and group size.

Possible approaches include:

- running a structured weekly group,
- using selected resources within existing wellbeing sessions,
- informal discussion groups,
- or self-directed individual use supported by occasional group conversations.

A typical session structure may include:

1. Welcome and Check-In

A brief informal opening to help people settle.

2. Introduction to the Theme

The facilitator introduces the topic for the session in simple, plain language.

3. Individual Reflection Time

Participants complete parts of the workbook individually.

4. Optional Group Discussion

Participants may discuss reflections in pairs or as a group if they wish.

5. Closing Reflection

End with a calm summary and encourage participants to continue reflecting between sessions.

Important Facilitation Principles

1. Go Slowly

Some participants may need longer than expected to think or write. Silence and reflection are valuable parts of the process.

2. Avoid Fixing

If someone shares a difficulty, facilitators do not immediately need to solve or reassure. Often listening respectfully is enough.

3. Respect Different Experiences

People will have very different experiences of retirement, ageing, health, family and identity. Avoid assumptions about what this stage of life “should” feel like.

4. Encourage Small Steps

The workbook focuses on gradual reflection and manageable changes rather than dramatic reinvention.

5. Normalise Mixed Feelings

It is common for people to feel relief, uncertainty, grief, excitement and anxiety at the same time during transition.

Creating a Supportive Environment

Helpful group environments are usually:

- calm,
- welcoming,
- non-judgemental,
- conversational rather than overly formal,
- and respectful of confidentiality.

Participants should be reminded:

- they may pause any exercise,
- skip questions if needed,
- and take part at a level that feels comfortable.

Some participants may prefer quiet reflection over discussion. Others may benefit from conversation. Both approaches are valid.

Signposting and Support

Although this workbook is not therapy, some discussions may raise emotional issues or highlight struggles with mental wellbeing, loneliness, bereavement or low mood.

Facilitators should therefore be aware of:

- local wellbeing services,
- community groups,
- bereavement support,
- GP or health services,
- and mental health support pathways where appropriate.

If a participant appears significantly distressed or discloses serious concerns, facilitators should follow their organisation's normal safeguarding and wellbeing procedures.

Final Note for Facilitators

This workbook is not about encouraging people to become endlessly positive or constantly busy.

Its purpose is to help people:

- reflect more honestly,
- recognise their strengths,
- understand transition more clearly,
- reconnect with meaning and connection,
- and move into the next stage of life with greater awareness and intention.

Often the most helpful thing a facilitator can offer is not expertise, but steady presence, patience and respectful encouragement.