





GOAL SETTING IN RETIREMENT PLANNING: REFLECTION IN THE LIGHT OF IMOGENE KING

ESTABELECIMENTO DE METAS NO PLANEJAMENTO DA APOSENTADORIA: REFLEXÃO À LUZ DE IMOGENE KING

PLANIFICACIÓN DE LA JUBILACIÓN Y ESTABLECIMIENTO DE METAS: REFLEXIÓN A LA LUZ DE IMOGENE KING

 Paloma de Souza Cavalcante Pissinati ¹
 Eleine Aparecida Penha Martins ²
 Raquel Gvozđ Costa ²
 Maria do Carmo Fernandez Lourenço Haddad ²

¹ Universidade Estadual de Maringá - UEM, Enfermagem, Maringá, PR - Brazil.

² Universidade Estadual de Londrina - UEL, Enfermagem, Londrina, PR - Brazil.

Corresponding author: Paloma de Souza Cavalcante Pissinati

E-mail: paloma_cavalcante_souza@hotmail.com

Author's Contributions:

Conceptualization: Paloma S. C. Pissinati, Eleine A. P. Martins, Raquel G. Costa; **Data Collection:** Paloma S. C. Pissinati; **Investigation:** Paloma S. C. Pissinati; **Methodology:** Paloma S. C. Pissinati; **Project Management:** Paloma S. C. Pissinati, Maria C. F. L. Haddad; **Statistical Analysis:** Paloma S. C. Pissinati; **Supervision:** Maria C. F. L. Haddad; **Visualization:** Paloma S. C. Pissinati, Maria C. F. L. Haddad; **Writing - Original Draft Preparation:** Paloma S. C. Pissinati; **Writing - Review and Editing:** Paloma S. C. Pissinati, Eleine A. P. Martins, Raquel G. Costa, Maria C. F. L. Haddad.

Funding: No funding.

Submitted on: 2018/06/05

Approved on: 2020/01/02

ABSTRACT

Objective: to reflect on the establishment of goals in retirement planning in the light of Imogene King's theory, which is characterized by being interactionist, based on Nursing care that is not restricted to the individual scope, but can be provided to a social group with the which the professional establishes contact. **Method:** reflective study carried out through theoretical support related to the theory of goal attainment by Imogene King and reflective analysis of the theme of retirement planning. **Results:** the establishment of goals occurs from the interaction between nurse and employee, in which each individual reacts in a particular way to retirement, influenced by their experiences and perceptions. It is up to the nurse to value the employee's knowledge, in order to encourage their adherence to retirement planning. The employee has basic information needs about retirement, which must be provided by the professional in a timely manner. **Conclusion:** the establishment of goals contributes to the employee concretely noting his advances until he leaves work. Imogene King's theory directs the occupational health nurse in setting goals with pre-retirement employees.

Keywords: Nursing Theory; Retirement; Occupational Health; Occupational Health Nursing.

RESUMO

Objetivo: refletir sobre o estabelecimento de metas no planejamento da aposentadoria à luz da teoria de Imogene King, que se caracteriza por ser interacionista, pautada no cuidado de Enfermagem que não se restringe ao âmbito individual, mas pode ser prestado a um grupo social com o qual o profissional estabelece contato. **Método:** estudo reflexivo realizado por meio de aporte teórico relacionado à teoria do alcance de metas de Imogene King e análise reflexiva do tema planejamento da aposentadoria. **Resultados:** o estabelecimento de metas ocorre a partir da interação entre enfermeiro e trabalhador, em que cada indivíduo reage de forma particular à aposentadoria, influenciado por suas experiências e percepções. Compete ao enfermeiro valorizar os conhecimentos do trabalhador, a fim de estimular sua adesão ao planejamento da aposentadoria. O trabalhador possui necessidades básicas de informação sobre a aposentadoria, que devem ser fornecidas em momento oportuno pelo profissional. **Conclusão:** o estabelecimento de metas contribui para que o trabalhador note concretamente seus avanços até o desligamento do trabalho. A teoria de Imogene King direciona o enfermeiro do trabalho no estabelecimento de metas com trabalhadores em pré-aposentadoria.

Palavras-chave: Teoria de Enfermagem; Aposentadoria; Saúde do Trabalhador; Enfermagem do Trabalho.

RESUMEN

Objetivo: reflexionar sobre la planificación de la jubilación y el establecimiento de metas a la luz de la teoría de Imogene King, que se caracteriza por ser interaccionista, basada en la atención de enfermería no limitada al alcance individual sino que incluye a todo el grupo social con el cual el profesional establece contacto. **Método:** estudio reflexivo

How to cite this article:

Pissinati PSC, Martins EAP, Costa RG, Haddad MCFL. Goal setting in retirement planning: reflection in the light of Imogene King. REME – Rev Min Enferm. 2020[cited _____];24:e-1283. Available from: _____ DOI: 10.5935/1415-2762.20200012

basado en la teoría de metas de Imogene King y análisis reflexivo de la planificación de la jubilación. Resultados: el establecimiento de metas ocurre a partir de la interacción entre el enfermero y el trabajador, en el que cada individuo reacciona de modo diferente a la jubilación, influenciado por sus experiencias y percepciones. Le corresponde al enfermero valorar el conocimiento del trabajador para fomentar su adhesión a la planificación de la jubilación. El profesional debe proporcionar de manera oportuna información básica sobre la jubilación. Conclusión: el establecimiento de metas contribuye a que el trabajador note concretamente sus avances hasta que se desvincule de su trabajo. La teoría de Imogene King orienta al enfermero de trabajo en el establecimiento de metas con los trabajadores que se preparan para la jubilación.

Palabras clave: Teoría de Enfermería; Jubilación; Salud Laboral; Enfermería del Trabajo.

INTRODUCTION

Population aging has triggered a series of consequences and challenges for society, especially about guaranteeing the well-being and economic security of people who age. Advances in health have contributed to the increase in life expectancy, characterized by a population that seeks to remain increasingly active, especially in the work environment.^{1,2}

The aging stage is also marked by an important phenomenon in the individual's life, retirement. This triggers several changes with repercussions on different areas of the individual's life, who need to prepare to deal with the disconnection, in order to prevent it from becoming a negative experience.³

To understand retirement, it is necessary to relate it to the central role that work assumes in the life of the individual, which has a direct impact on the social relationships established by the employee. The way in which the individual will experience this process will depend on the experiences and bonds established along their trajectory.⁴

As they approach retirement, individuals need to adapt to their new routines, the period of preparation being fundamental to organize this transition and the activities that they intend to maintain. Therefore, planning to leave work is essential for the individual to feel satisfied with the new moment of life and to be able to adapt to the changes resulting from this decision making. In this sense, it is up to the work organizations to assume the responsibilities in the orientation process of their employees.⁵

Employee participation in a retirement preparation program, with objectives and interventions geared to the needs of participants, constitutes an important tool for achieving positive results, such as improvements in knowledge, expectations and changes in attitudes towards the decision to disconnecting from work.⁶ Thus, employees should be encouraged to establish goals that favor the achievement of

their retirement, in addition to assisting in the management of possible feelings experienced during this process.

The reach of well-being in retirement is directly related to the existence of plans for different areas of personal life. Therefore, it is essential that employees establish goals for the care of their physical, emotional and cognitive health, seek to insert themselves into social and motivational activities, adopt financial planning and strengthen interpersonal relationships.⁷

Managers and, above all, occupational health nurses play a fundamental role in guiding employees in retirement planning. It is necessary to include these individuals in this process, in order to participate actively through the development of goals that facilitate healthy dismissal from work.

Thus, the Theory of Goal Attainment proposed by Imogene King is an important theoretical framework that guides the action in Nursing in this perspective. This assumes that, through the relationship between nurse and patient, it becomes possible to jointly establish the needs of each individual.⁸

The theory proposed by Imogene King is characterized by being interactionist, based on Nursing care that is not restricted to the individual scope, but can be provided to a social group with which the nurse establishes contact. The patient is at the center of the process and is involved in all stages, aiming to obtain the best results and satisfy the patient's needs, based on the definition of goals.⁹

The established goals guide the nurse's work to detect any reaction that the individual may present in the face of a new situation.⁹ Thus, this theoretical framework constitutes an important basis for reflection on the establishment of goals by employees in the planning process of retirement.

There is a gap in studies that relate Nursing theories to the retirement planning process. Therefore, this study contributes to reflect on the possibility of using the assumptions of Imogene King, as a theoretical foundation for the practice of nurses with pre-retired employees.

The present work was structured in two axes of analysis: a) establishment of goals as an assumption of Imogene King's theory; b) setting goals as a strategy to facilitate retirement planning. These topics were explored based on reflections on the relevant literature that supported the authors' statements.

Therefore, this research aims to reflect on the establishment of goals in retirement planning in the light of Imogene King's theory.

SETTING GOALS AS THE ASSUMPTION OF THE IMAGENE KING THEORY

Currently, Nursing seeks to base its practice on a theoretical framework. Among the various theories that guide the actions of professionals, those with an interactive character stand out,

such as the theory proposed by Imogene King, which values shared decision making between nurse and client.¹⁰

For King⁸, Nursing is a process of exchanging information between the professional's and the client's impressions. Nursing actions are performed in environments in which a relationship is established between the parties involved. From that moment it becomes possible to define common goals.

Still, according to this theory, individuals are formed by three interactive systems: personal, interpersonal and social. These are open to the environment and interact to ensure the individual's balance and health.⁸

The personal system understands the characteristics of each person, who will react to the events experienced according to their perceptions, expectations and anxieties.⁸ This concept can be applied to the topic of preparation for retirement, when it finds that the pre-retired employee reacts to the phase of dismissal work according to their previous experiences and desires.

The interpersonal system, on the other hand, comprises the dimension where human interactions occur, which define how an individual perceives and reacts to the actions of the other. Still, it includes definitions such as communication, role, stress and the transaction, which constitutes the process of interaction that man uses to communicate with the environment and achieve his goals.⁸

The social system represents the roles, behaviors and practices that define the reactions of the groups. It can be viewed when there is a meeting between teams with special interests and needs, which organize and form societies.⁸ This situation can be observed in groups of pre-retired employees, who share common goals and similar reactions in relation to retirement expectations.

It is noted that professional Nursing practice must be based on human relations and communication, in order to result in the mutual participation of their representatives. Through interaction, confidence is promoted to those who receive care, as well as satisfaction to the professional who provides it.¹¹

Still, the relationship between the nurse and the client must be intentional, in a way that allows the definition of goals directed to individual priorities. In this sense, communication becomes essential, as it allows the professional to identify the needs and potentialities to be worked on to achieve the objectives.¹²

It is considered that the client should be actively inserted in the processes related to care. The established interaction is fundamental for achieving goals and restoring the individual's well-being. And it is necessary to offer the employee who is close to retirement opportunities for reflection and the establishment of goals for the post-career.

The nurse can support the employee in reflecting on the goals for the future, not only with regard to the financial aspect, but also how he intends to occupy the time, which leisure activities arouse interest, the incentive received from family and friends, in addition to possible actions they can perform in the community.⁷ It is necessary to reflect on how prepared you are to leave work and, above all, on the importance of setting goals that contribute to better adaptation to retirement.

In the theory of goal attainment, human beings are considered rational, perceptive, intentional and, when interacting, they can acquire autonomy and establish life goals, as well as define ways to achieve them. Thus, to take care of their health, they need to receive useful and applicable information at the appropriate time when they realize their problems.¹²

Therefore, this theory prioritizes that the goals defined jointly, by the client and the nurse, are achieved through the interaction between these individuals. It is a dynamic method that allows the inclusion of the client in the process of understanding their needs, which is fundamental in the employee's pre-retirement process.

GOAL SETTING AS A FACILITATING STRATEGY FOR RETIREMENT PLANNING

For many employees who are approaching retirement, dismissal has a negative connotation, due to perceptions such as the onset of illness and proximity to death. The absence of alternative plans that encourage the development of other activities, replacing work, can aggravate these representations and restrict the view of individuals in the face of new possibilities.¹³

In this sense, the theory proposed by Imogene King represents an adequate reference to guide this planning process. This theory becomes applicable, as it reinforces the importance of setting goals during the interaction with the client⁸ and involving the employee in the preparation for retirement.

It is noteworthy that the way employees react to retirement is still unpredictable and, at times, unknown. Thus, understanding the attitudes of individuals, the predictors of their behavior, the myths and prejudices related to this stage of life can contribute to the management of this challenge.¹⁴

The way in which each employee manifests himself in the face of the process of retiring can be explained through the concept of perception proposed by King. This concept is understood as the representation that each individual has of himself and the reality he experiences and comprises a

unique experience, which defines the way each person reacts to an event in a particular way.⁸

Still, according to the theory of goal attainment, each individual constitutes a personal system, characterized by experiences, perceptions and life goals. In this way, the concepts that define such a system will influence the choices and visions of the lived experiences.⁸

Thus, knowing the perception of the employee in the pre-retirement phase is essential for the occupational health nurse to interact with the employee. By understanding the way in which the individual experiences this phenomenon, it becomes possible to establish a relationship with him and define common goals that will assist him in this process.

The preparation for retirement should be based on the construction of a life plan that encourages the practice of intellectual activities, reflection on new professional options, family and social life. Therefore, the employees themselves establish priorities according to their interests, motivated to organize the dismissal.¹⁵

However, in order for the individual to adhere to the defined goals, it is necessary for the nurse to establish a close interpersonal relationship with the client, through communication that promotes the effective bond.¹⁰ The challenge of achieving goals can be overcome by through dialogue and understanding of the specificities of the employee who experiences the pre-retirement phase.

When reflecting on the proximity of retirement, employees value their life history, wishing to be seen as people who have needs and feelings that deserve to be recognized.¹⁵ Accordingly, the theory of Imogene King prioritizes the client's experiences, perceptions, wishes and beliefs, from the construction of a relationship of agreement, mutual contribution and responsibility with planning.¹⁰

Preparing for retirement requires employees to reflect on the different dimensions that influence their decision making. Among the goals to be discussed are family relationships, risk factors, personal and social well-being and the new professional start, which must be addressed according to the importance attributed by pre-retirees.¹⁴

The main objective of the occupational health nurse, according to the theory of goal attainment, is to help the individual to stay healthy, being necessary to see the individual as a whole person, influenced by the external environment in which the individual lives.⁸ Therefore, the factors related to retirement must be worked in full by the nurse, recognizing the extent of internal and external influences that determine the actions and reactions of the pre-retired employee.

Still, Imogene King considers that man has three basic health needs: information, preventive care against the disease and when unable to take care of self.⁸ When considering

this assumption, the nurse assumes, in the practice, the responsibility to guide the patient preparing for retirement and providing the necessary information.

It is observed that the theory of Imogene King represents a managerial tool to direct the establishment of goals for employees in retirement phase. In addition, it contributes to achieving the objectives, since the nurse-patient interaction, as well as the exchange of information, stimulates the patient's adherence to the plan of life.⁸

FINAL CONSIDERATIONS

In view of the reflections presented, it is noted that the theory proposed by Imogene King allows us to understand the importance of the interaction between nurse and client in setting goals, also applicable to the topic for retirement planning. It is up to the professional to look for strategies to actively insert the employee in the definition of priorities according to his feelings and expectations in the face of dismissal from work.

The use of goals in retirement planning contributes to the employee concretely noting the advances achieved until their complete dismissal from work. In addition, the joint determination of objectives can contribute to more adherence to the proposed plan.

Despite the time it took to formulate this theory, it remains applicable and pertinent today. Imogene King brought innovative concepts that lead to reflect on the way we conduct Nursing care and value the knowledge of the client assisted.

Thus, the theory of goal attainment can be used to support the practice of several areas of Nursing, in which the individual becomes the center of care. In this study, we chose to apply it to the topic of retirement, given the significant contingent of pre-retired employees who need to plan their dismissal from work in a positive way.

REFERENCES

1. Aisa R, Larramona G, Pueyo F. Active aging, preventive health and dependency: Heterogeneous workers, differential behavior. *J Econ Behav Organ.* 2015[cited 2018 May 26];117(1):1-9. Available from: <http://www.sciencedirect.com/science/article/pii/S016726811500164X/pdf?md5=7bd4c1918cd4bb22b9860493c69f2ed9&pid=1-s2.0-S016726811500164X-main.pdf>
2. Bloom DE, Chatterji S, Kowal P, Lloyd-Sherlock P, McKee M, Rechel B, et al. Macroeconomic implications of population ageing and selected policy responses. *Lancet.* 2015[cited 2018 May 26];385(9968):649-57. Available from: [http://www.thelancet.com/journals/lancet/article/PIIS0140-6736\(14\)61464-1/abstract](http://www.thelancet.com/journals/lancet/article/PIIS0140-6736(14)61464-1/abstract)
3. Macedo MLAF, Pires DEP, Cavalcante CAA. Aposentadoria na Enfermagem: uma revisão de literatura. *REME - Rev Min Enferm.* 2014[cited 2018 May 26];18(4):986-91. Available from: <http://www.reme.org.br/artigo/detalhes/977>

4. Kilimnik ZM, Reis Neto MT, Santos GS, Malta VD, Santos MF. O significado do trabalho: um estudo com professores de administração em uma universidade. *Rev Lugares Educ.* 2015[cited 2018 May 26];11(1):3-27. Available from: <http://periodicos.ufpb.br/ojs2/index.php/rle>
5. Hershey DA, Henkens K. Impact of different types of retirement transitions on perceived satisfaction with life. *Gerontologist.* 2014[cited 2018 May 26];54(2):232-44. Available from: <https://doi.org/10.1093/geront/gnt006>
6. Leandro-França C, Murta SG, Hershey DA, Martins LB. Evaluation of retirement planning programs: a qualitative analysis of methodologies and efficacy. *Educ Gerontol.* 2016[cited 2018 May 26];42(1):497-512. Available from: <http://dx.doi.org/10.1080/03601277.2016.1156380>
7. Gvozd R, Rossaneis MA, Pissinati PSC, Guirardello EB, Haddad MCFL. Cultural adaptation of the Retirement Resources Inventory for Brazilian culture. *Rev Saúde Pública.* 2019[cited 2019 Dec 04];53:60. Available from: <https://doi.org/10.11606/s1518-8787.2019053000863>
8. King IM. *A theory for nursing: systems, concepts, process.* New York: Wiley Medical Publications; 1981.
9. Caceres BA. King's theory of goal attainment: exploring functional status. *Nurs SCI Q.* 2015[cited 2018 May 26];25(2):151-5. Available from: <https://www.ncbi.nlm.nih.gov/pubmed/25805388>.
10. Garcia MCC, Cirino ID, Elias TMN, Lira ALBC, Enders BC. Interação enfermeiro-paciente na adesão ao tratamento da tuberculose: reflexão à luz de Imogene King. *Rev Enferm UFPE on line.* 2014[cited 2018 May 26];8(Sulpp 1):2513-21. Available from: http://www.revista.ufpe.br/revistaenfermagem/index.php/revista/article/view/6514/pdf_5757
11. Baggio MA, Erdmann AL. Processando o cuidado “do nós” nas relações/interações estabelecidas por profissionais de Enfermagem e de saúde. *Cogitare Enferm.* 2015[cited 2018 May 26];20(3):573-80. Available from: <http://www.redalyc.org/articulo.oa?id=483647680017>
12. Moreira MDS, Gaiva MAM. Comunicação do enfermeiro com a mãe/família na consulta de Enfermagem à criança. *Ciênc Cuid Saúde.* 2016[cited 2018 May 26];15(4):677-84. Available from: <http://www.periodicos.uem.br/ojs/index.php/CiencCuidSaude/article/view/32093>
13. Pires AS, Ribeiro LV, Souza NVDO, Sá CMS, Gonçalves FGA, Santos DM. A permanência no mundo do trabalho de profissionais de Enfermagem com possibilidade de aposentadoria. *Ciênc Cuid Saúde.* 2013[cited 2018 May 26];12(2):338-45. Available from: <http://periodicos.uem.br/ojs/index.php/CiencCuidSaude/article/view/18298/pdf>
14. Macêdo LSS, Bendassolli PF, Torres TL. Representações sociais da aposentadoria e intenção de continuar trabalhando. *Psicol Soc.* 2017[cited 2018 May 26];29(1):e145010. Available from: <http://www.scielo.br/pdf/psoc/v29/1807-0<310-psoc-29-e145010.pdf>
15. Nalin CP, França LHFP. Resilience and Well-Being in Retirement. *Paidéia.* 2015[cited 2018 May 26];25(61):191-9. Available from: <http://www.scielo.br/pdf/paideia/v25n61/1982-4327-paideia-25-61-0191.pdf>