

**May 2010**

**Working Longer: The Heroic tasks required of older workers to maintain their careers longer and manage work transitions later in life.**

By Kaye Avery

AUT Student ID: 981 0237

**Abstract**

This study explores the developmental tasks people need to master in order to successfully work longer than they had expected to when retirement was obligatory. It aims to assess how well people find career congruence within their own set of personal circumstances and life structures while experiencing a newly globalised environment where change is constant, retirement is an outdated concept and planning, difficult. It looks at the theoretical concepts and research associated with this group, and in particular, it explores themes of personal development and the challenges presented by the current employment conditions and policies in New Zealand that impact on later careers.

The study challenges the traditional theories which purport that the later stages of the working career are about loss and disengagement. It acknowledges that life is a 'heroic' journey toward the fulfillment of a life purpose, and that the later stages of the career journey in the new work environment present opportunities for personal transformation and development.

**Introduction**

In the practice of career transition support and coaching, older people who seek out my services come with a wide and diverse set of issues for which traditional career evaluation processes hold limited relevance. In practice, the current working environment presents challenges of socioeconomic instability due to globalisation and rapid technological change. Together with an aging population makes this group somewhat vulnerable to changing social policy, shifting economic conditions, and cultural perceptions and expectations. Between 60 and 70 years of age the dilemmas of career considerations versus lifestyle, financial needs versus health and wellbeing, and looking after individual concerns versus supporting families and communities, become a complex set of choices through which this cohort must navigate. These dilemmas present at a time when there is but a short window of opportunity to make changes that support continued development and wellbeing.

How do people in their 60s master the shifting conditions of this environment and feel they can complete their working careers satisfactorily? This is the recurring question that underlies this enquiry. The title of this paper, *Working Longer: The Heroic tasks required of older workers to maintain their careers longer and manage work transitions later in life*, expresses the assumption that the new working environment presents challenges to overcome, yet it also offers opportunities for significant personal development and conscious development. Rather than accept that old *life stage* paradigms of *maintenance* and *disengagement* will continue to play out as older workers manage these times, I propose that new ways of understanding the later career transitions can be emphasised and more positive approaches to support older workers offered.

The study aims to substantiate this view and bring greater awareness to practitioners about theoretical models that may be more helpful in career development and career management practice when working with older clients. The study involved interviewing 10 professionals between the ages of 60 and 70 from diverse careers and experience, and personal circumstances to establish common themes.

## **Background**

Under the New Zealand Human Rights Act of 1993 retirement became no longer mandatory, and since 1999 it became illegal for an employer to demand retirement of an employee based on their age (Hurnard, 2005). What was once a 'normal' work/life transition then changed older workers experience and expectations dramatically. Changing economic conditions, increasing longevity, decreasing birth rates and changing cultural and social perceptions around the benefits that come with continued engagement and contribution have since continued to impact on the older worker.

The 'Baby Boomer' generation throughout the developed world has experienced unparalleled cultural, environmental and economic changes having been born into the post WW2 society. This has required quantum shifts of perception, development and adjustment of expectations. The expectations their parents had of 'deserving' a good pension, having paid taxes all their lives, and 'looking forward' to retirement, are not afforded to many in this generation. As the demographic shifts toward a greater proportion of the population being over 65 than ever before and diminishing birth rates, governments are concerned about the health care and potential costs of supporting a growing number of retirees, longer. With improved health and medical care New Zealand's anticipated average life expectancy for 2045 is 85.2 years according to The World Resources

Institute's Population, Health and Human Well-being — Demographics. (EarthTrends, 2010)

According to the New Zealand Treasury Working Paper on *The Economics of Aging* (Stephenson, 2002), "Population aging has the potential to become the single biggest economic and policy issue of the next fifty years" (p.22) Forecasts presented in the report predict that the proportion of people over 65 in New Zealand will have increased from 12% of the population to 26% by 2050. A recent media release in the *New Zealand Herald* presented a case for compulsory superannuation as being critical to the economic wealth of New Zealand, pointing out that the ratio of workers per retiree will fall from 5 currently to only 2 by 2050. (Glass, 2010) This statistic is a worrying one, not only for individuals who are moving into the 'older worker' bracket and who wonder how they will afford their living costs in retirement, but also for the economy in general.

The demands on people in their 60's to take more responsibility for their post retirement lifestyles has become a major concern, particularly as they arrive at this age with a very wide, diverse set of circumstances, state of health and financial status. The recent global recession has compounded the issues of economic well-being, impacting across all sectors of society and in particular on people's investments and retirement funds. Another article published on 14<sup>th</sup> May 2010 in the *New Zealand Herald*, (NZPA) provided information from the Families Commission Survey (2008), highlighting that home ownership in the current 40-64 age group is half of that of those who are currently over 65. This statistic alone presents a compelling argument for improving the employability and self-efficacy of older people so that they can build their asset base beyond 65. It also raised the issue that older single women in this cohort have less likely hood of building their assets than do men.

The EEO Trust in collaboration with the New Zealand Human Rights Commission have contributed important pieces of research relating to the aging workforce and its economic implications (McPherson, 2009). They have played a significant role in shifting organisational perspectives about the contribution older employees make. Judith Davey, for the Institute for Research on Aging, has conducted numerous studies in this area. In the work she did with Mary Davies, *Work in Later Life – Opportunity or Threat*, (2006) Davey describes the *push – pull* effect experienced by older workers. Motivations such as having the wish to improve work life balance and juggle the caring responsibilities of aging parents and also grandchildren are conflicted by the economic necessity of saving for a longer retirement. On the other hand remaining engaged, contributing and connected through continued work involvement is seen as positive. (p.4)

Given the pressures as outlined for older workers to work longer, a greater degree of understanding about what makes it possible for people to manage this phase of their careers whilst also enjoying good health and well being, is critical. The study posits that career management and personal development are intertwined, and that rather than focusing on later stages of life and career as being about loss and deterioration, that we look at how people who age successfully continue to make a contribution in their work do. In this way, new models of career counselling, coaching and talent management could be realised, and the perceptions about the potential contributions of older workers be changed to a more positive view.

A wide range of literature was reviewed covering recent research in the areas of career and adult development theories, human resources development, statistics, business, health and government policy, gerontology and psychology.

### **The Hero and Identity**

I begin this study with the idea that, as we age, we are more ardent in our search for meaning and purpose (Frankl, 1985) and more intrinsically motivated to transform limiting perceptions and experience. The concept of the Hero's Journey encapsulates this idea. In our 60s and 70s we find our way across some rugged terrain with fewer opportunities to recover from the misadventures of the past toward the closure of our working lives. The older Hero represents the *self* that overcomes latter challenges whilst on the quest to find integrity. (Cervone, 2008; Levinson, 1978; Tocher, 2006)

Over centuries people have used myth and story to reflect on the human experience, its relevance is no less potent for our times. (Tocher, 2006) The Hero is a recurring archetype identified by Carl Jung and furthered by Joseph Campbell in his *The Hero with a Thousand Faces* (1949) and is seen as a universal metaphor representing man in search of identity and consciousness. Jung in particular, believed that all individuals face the life task of finding unity in the *self* and that this search represented a never-ending quest. (Cervone & Pervin, 2008) Campbell's understanding of the Hero's journey was used by George Lucas in the creation of the Star Wars trilogy drawing recent attention to the powerful idea that life is lived through various rites of passage; from the call to adventure, through overcoming fear and crossing the threshold, facing death and returning, resurrected with a renewed mission to save the world.

The achievement of the aging Hero is beautifully expressed on practicing psychotherapist, Mary Hilkin's website <http://www.herosjourney.com/Pages/herosjourney.htm> "When the

*tasks have been completed, the hero returns home. ... His vision has been so expanded, his tenacity so tested, his wisdom so deepened, that his greatest prize is his own matured Self. The Hero re-enters his community with greater stature, and enriches his family and his community with all that he has learned.* (Hilkin, 2010)

The journey of the Hero intensifies when people experience major transitions at midlife and later when their children leave home, when there are challenges at work and in relationships, and when parents die. Commonly other changes happen at this time too, as the protagonist struggles to find equilibrium in the structures that have hitherto supported their identity. The hero offers us an archetype that spurs our motivation toward 'winning' over adversity. (Kegan, 1982)

### **Development Theories**

Theorists in the field of adult development offer concepts that help practitioners understand what motivates older people as they continue their working lives towards a satisfactory retirement. Developmental theorists such as Erik Erikson, Carl Jung, Daniel Levinson, Robert Kegan, and others agreed that people move through a series of developmental stages based on the resolution of crucial issues to restructure identity.

Carl Jung brought to the field of psychology the concept that over a lifetime individuals become more 'whole' by integrating the unconscious aspects of *self*. He called this the *individuation* process. His theory incorporated the idea that we participate in a *collective psychology* which includes that of the *collective wisdom* and its shadow form, the *collective unconscious*. Both Jungian concepts; *individuation* and the participation in the *collective consciousness*, embrace the general themes of adult development over a lifetime and being challenged to master and integrate environmental conditions in the process of finding wholeness in *self*. (Cervone & Pervin, 2008)

Through his research of men in 1978, and later of women in 1987, Daniel Levinson concluded that adult development involved a simple *life structure* concept consisting of four stages; pre-adulthood, early adulthood, middle adulthood and late adulthood. Like other developmental theorists, he believed that the shifts from one stage to another often involved crises of identity. (Levinson, 1978)

Erik Erickson (Kroger, 2007) expanded early psychoanalytical stage development theory by putting greater importance on the social context of development which, he believed, comes from the organism itself and is supported or interfered with by the social structures that surround it. From a

*life stage* perspective, Erikson described eight stages of identity or psychosocial development over a life time, the last two being *generativity* versus *stagnation* involving the resolution of authority, and *integrity* versus *despair*, involving the commitment to an ideology that supports one's identity.

In their book, *Counselling Adults in Transition*, Schlossberg, Waters and Goodman(1995) state that "concerns...like any other conflicts identified by Erikson, can surface or resurface at any stage of life."(p.126) Schlossberg et al, further note that historical trends, social behaviours and contextual circumstance have an impact on the life-stage concept deeming it to be different for different people at different times in history. (p.7) Although Daniel Levinson, too, identified clear stages of the development of a life structure, he also gave significant credence to the importance of contextual conditions; family, religion, race, economic status and work.

The question is, how relevant are stage and age related theories now in this new world? Gail Sheehy (1977) is most notable in the late 1970s and 80s for making popular the idea that crises of identity are predictable and happen at certain ages over the life cycle. The most touted milestone, mid life, predictably throws up challenges such as children leaving home, menopause and relationship breakdowns, happens at differing times for different people, under differing economical and cultural conditions now.

Kossek and Lambert (2005)refute the life-span, life stage concepts that purport that age related transitions are predictable. Also Schlossberg, Waters and Goodman (1995) noted that researchers Brim and Kagan (1980) disputed the life-stage concept due it being sequenced in time, cumulative and irreversible, and that these ideas are not supported by evidence. (p.17) They believed that development is not predictable; that people arrive at certain stages of life differently and that social, political and economical influences can cause different impacts from one generation to another.

To demonstrate their point; parenting of dependent children during the mid 20<sup>th</sup> century spanned many more years than it does now, meaning that women were often out of the workforce for some time and commonly never entered it. Now, only one or two generations later, women can continue in the workforce or have only a short time out of it while parenting because they have smaller families and can access government subsidized childcare. Contributing to this are shifts toward a more equitable society, enabling male partners to be more willing to provide a greater degree of childcare.

Socioeconomic shifts of the last 20 years have put question to *life stage* theories. Mark Savickas, Nota, Rossier, Dauwalder, Duarte, Guichard, Soresi, Van Esbroeck, and van Vianen (2009) state in the *Journal of Vocational Behaviour* that 20<sup>th</sup> century career theories and techniques need to be reformatted to fit this new environment. (p.240). Furthermore they challenge the assumptions made by universal theories that personal characteristics and contextual situations are stable. In their paper, *Life Designing: A paradigm for career construction in the 21<sup>st</sup> century*, they describe these times as “A crisis in career development models and methods.” They propose a *Life Course* model as being the most useful and relevant model for our times emphasising it as being holistic, and addressing “how different identity frames and forms are interwoven.” (p.13)

*Life Course* proponents such as Glen Elder Jr. offer a more comprehensive theory that suits the thesis of this paper in that a *life course* is defined as a sequence of events and roles that are socially defined and enacted over a life time. *Life Course* theory is considered a new framework which enables us to better understand how experience influences perceived ‘successes’ and subjective well-being. It incorporates and integrates the impacts of interlocking transitions of family members, contextual conditions and experiences, and social perceptions and expectations. (Elder, 1999)

At a conference in 1999, Glen Elder presented a paper that provided an insight into the evolution of *Life Course* theory and how it reformulated *life-span* concepts for development and aging. He described how lives are socially organised and evolve, and are interlinked with social changes, processes and mechanisms. The paper, *The Life Course and Aging: Some Reflections*, suggests that, although there is biological change and decline as we age, our cultural resources and wisdom increase as the aging organism develops. He believes this is due to the *multi-directionality of life-span development*. (p.4) Elder outlines in his address the three levels that interplay over a *life course* as being; 1. The actions and policies, organisations and dictates of the market. 2. The individuals own choices and constraints and career trajectory and 3. The intellectual functioning, self – efficacy and values of the individual.

### **Positive Psychology**

Other research, particularly in the newer fields of positive psychology, neuroscience and healthy adult development highlight the helpful and positive aspects of the maturation process. Robert Kegan. (1982) believed that the identity development of an individual was not related to age, but to one’s ability to cope with increasing levels of complexity through accumulated experience He proposed that there are two necessary ingredients for successful development; challenge and support.

Kegan's (1982) five orders of consciousness theory offers a developmental *life stage* process which, like Erikson and others, emphasises the transforming of identity confusion in a process that moves from *subject* to *object*. The adult stages of his theory involve the ability to subordinate their desires to the desires of others (Third order), creating a *self* that exists even outside of its relationship to others (Fourth order), and achieving of an evolved level of consciousness (Fifth order) which, having learned the limits of their own inner system, can see across inner systems to look at the inner similarities and interconnected nature of relationships.

Similar to Kegan's concept of identity confusion, Marjolein Lips-Wiersma (2002) of Canterbury University proposes that a lack of equilibrium occurs when one or more core animators; *developing and becoming self, union with others, expressing self* and *serving others* are out of balance. This universal construct of identity confusion followed by transformation applies to the experience older workers have in later work transitions.

Ways of looking at life transitions and stage development that are more open to difference and environmental influence are important now. In his book, Gene Cohen (2005) suggests four of adult development phases which happen from early midlife onwards. The first phase, *mid-life re-evaluation*, occurring between the ages of 30 to the mid 60s, is a time when people confront a sense of their own mortality. The second phase, he calls *liberation and innovation* between 50 and 70 when the career horizon is recognised and people ask, "If not now, when?" feeling a sense of greater freedom to *get on with it* than they may have had before. Phase three occurs anytime between the late 60s and into the 90s and is a time when people wish to *share their wisdom*. Phase four, from the late 70s to the end of life, he found, is when people want to *explore life themes* in a positive light and how these impact on family and community. It is interesting to note that Cohen's phases overlap but provide an integrative, individual process towards the resolution and closure of a lifetime.

Cohen (2005) points out that new science indicates that the brain is more 'plastic' (has the ability to grow new neurons) than we understood it to be, and the phases people move through in life are more fluid than the likes of Erikson believed. (p.xvii) He further states, "As we mature, developmental intelligence is expressed in deepening wisdom, judgment, perspective, and vision." (p.xix)

## **Working Longer**

The study of aging workers has traditionally focused on themes of loss and disengagement when the world, its systems and practices were predictable. Now that this has changed, new ways of dealing with later work transitions need to happen. For Human Resources professionals, this is challenging, particularly now with policies that dictate that there is no legal obligation for people to retire and that the rights of the employee are paramount. This presents a dilemma in the way conversations about performance and succession planning happen with older workers. Managed well, they can empower transparency and a sense of support and self-efficacy. Managed badly however, inevitably leads to self-protection, lack of transparency and no support.

The current environment is so competitive and dynamic that organisations must be flexible to meet the demands of a global market. In this environment where restructuring is constant due to changing organisational strategies, succession planning is difficult or doesn't happen and employees can be marginalised and vulnerable. These are often the older workers who have not kept up with technological changes or who have held expectations of their employers which are no longer appropriate.

On the whole, perceptions and commonly held beliefs about older workers' potential have been negative. They are; that their skills are inferior to younger employees, especially around technology; that they are less flexible and ready to change; are no longer keen to grow their careers – will soon be ready to disengage; are less transparent about what they are experiencing, and less certain, driven, or confident. From a strategic HR perspective the older employee presents a reduced need or potential return on investment (ROI) for training and development. (McPherson, 2008) Equally the older employees themselves, have self limiting attitudes such as; having the confidence to assert themselves or keep up, and that they have limited potential because they are losing their intellectual edge. This perpetuates the age bias that exists and is a self-fulfilling prophecy that has not served the older worker or the organisations that employ them. (Greller, 2004)

In their article, *Making the Most of "Late-Career" for Employers and Workers Themselves: Becoming Elders not Relics*, Greller and Stroh (2004) suggest that "*Fostering dialogue, to a disturbing degree, in late-career is an organizational unmentionable. People do not candidly articulate their beliefs, fears, and expectations. As a consequence, they operate largely on assumptions.*" (p. 9) Furthermore Greller and Stroh express their concern that a denial of ageism in the workplace and the subsequent inaction to address it creates an erosion of human capital and inevitably an early retirement for the

employee. However, the proactive and healthy older worker with a *protean* orientation to their career will not depend on their employer to initiate development and learning opportunities, rather that they would override any assumptions about abilities and discrimination to insist on it. (p.10)

Age discrimination has been a key issue that has had significant focus in the media and in human resources arenas for some time. Kenneth Howse (2009) posits that social scientists have neglected to probe into the social and institutional forces that determine the opportunities and possibilities available to aging populations. Rather he criticizes the preoccupation they have with the negative aspects and challenges faced. (p.390)

### **So how does theory support practice in this new paradigm?**

Mark Slavickas's (2009) *Life Design* intervention suggests that careers, being life-long and contextual, require a preventative framework that aims to increase peoples' ability to be adaptable to developmental tasks and to narrate and construct their *story*. In this way people are more able to create a life that is more congruent, where they can engage in activities that build new dimensions to their experience, and impose meaning, and whereby intentionality and taking action is critical.

Some people manage to succeed at working longer by continuing to develop and make a contribution, whilst others let their career effectiveness diminish, leaving them open and vulnerable to redundancy or loss of career currency. This could be explained by referring to the latter two stages of Eric Erikson's Eight stages of development; the establishment of *generativity* versus *stagnation* (middle life) and *integrity* versus *despair* which are appropriately relevant as people engage and master, or fail to master, the last stages of their working lives, even now. (Cervone & Pervin, 2008) One could deduct from Erikson's theory that those who don't succeed at the challenges they encounter could experience *stagnation* and *despair* resulting in lack of well-being and hopelessness having not achieved their goals.

Donald Super's theory of the development and construction of a *self concept* over a *life course* suggests that people tend to *maintain* or plateau their careers during the middle part of their working lives, and beyond mid life there is a disintegration and *disengagement*. Within the current context however, the *maintenance* and *disengagement* stages are not as clearly defined as they once were when careers were stable, and no longer serve the new paradigm. Although Super's newer ideas that within the maxi-cycle are mini-cycles of change and development, the concept that

one ultimately reaches a stage of *career maturity* holds little weight when considering a life-long-learning approach. (Savickas & Walsh, 1996)

Research carried out by Sean Robson(2000) in his doctoral thesis explored the relationship between age and the utilisation of *development* and *maintenance* strategies. His findings questioned the perpetuated myth that older workers lessened their focus on *development* whilst putting more energy into *maintaining* their careers. From his research he found that motivations for *development* and *maintenance* varied greatly, moderated by organisational values and attitudes. Employees who felt supported and were offered *development* opportunities by their organisation were engaged and did not feel the need to self-protect. In contrast, workers who were not adjusting goals and revising values were more likely to use *maintenance* strategies; suggesting that this was likely to be an effort to prevent loss. (p.54)

Robson also looked at accommodative coping scales in relation to *development* versus *maintenance* strategies finding that *high accommodative coping* was more likely to show up in people engaged in *maintenance* strategies and *low accommodation* was present in those who preferred *development*.

Douglas Hall and Philip Mirvis in *The New Career Contract: Developing the Whole Person at Midlife and Beyond* (1995) describe the aging worker as being an *untapped resource* (p.268) They identified that there has been a shift from an organisational career to the *protean* career which is essentially about a person's self-directed search for fulfillment. Hall suggests that the *protean* career concept stresses continuous learning by tapping into deeper interests and intrinsic rewards. He identifies two *meta-skills* for older development – *identity growth* which involves increased complexity through self-reflection and self-learning, and *adaptability*. (p.270) The *Protean* career concept promotes the contributions of older workers in that they are more flexible and able to maneuver the new environment because they are less likely to be constrained by other commitments and preoccupations as much as younger colleagues. (1995)

In the comprehensive workbook for organisations; *Age Matters: Employing, Motivating and Managing Older Workers*, Karen Smedly and Helen Whitten (2006) have written a practical workbook that challenges institutional prejudice, offering workshop material that addresses the myths that have hitherto limited the contributions of older employees. They challenge the negative perceptions that continue to plague organisations, individual's own self-perception, and society in

general, so that older workers are more supported and encouraged to continue making a valuable contribution.

The findings of Edythe McNickle's (1997) research suggests that *intrinsic motivation, self-efficacy and collective efficacy* are key factors in planning for later work transitions, however she notes that other circumstances such as superannuation savings and social connection status compromise the decisions of older workers to make necessary transitions. This again suggests the *push-pull* factor that Gene Cohen discusses in his book, *The Mature Mind: The Positive Power of the Aging Brain*.(2005)

*Self-efficacy* is touted as one of the most important skills development for this new era. Albert Bandura has been the main exponent of the concept since his work in the 1990s. He suggests that *self-efficacy* contributes to cognitive and skills development which results in improved motivation and decision-making processes. (Cervone, 2008)

The knowledge based economies of today support the older worker who continues to develop, adding to their vast knowledge – both institutional and life based. Ruth Kanfer and Phillip Ackerman's (2004) research points out the vulnerability of labour oriented careers that engage older workers. Kanfer and Ackerman propose that work motivations at midlife and later *follow the same basic work motivations in young adulthood – namely, the allocation of personal resources to work behaviours that build on competencies, promote a sense of self-efficacy and self-concept, and offer opportunities for the attainment of desired outcomes*. They posit that work motivations of older workers can be enhanced by organisational practices. (p.455) Furthermore they suggest that although older workers are high on knowledge, they may have less of the organisational measure of cognitive effort and time, which are the *contemporary process-oriented formulations*.

### **Later Work Transitions and Retirement**

People in their 60's re-evaluate their lives as the career horizon gets shorter, usually when circumstances trigger the need for change, which may or may not include retiring from the workforce entirely. Statistics New Zealand and The Department of Labour (Dixon, 2008) undertook a longitudinal study of people born between April 1936 and March 1940 who were earning between April 1999 and March 2007. The study group was chosen so that they reached the age of 66 years old by the end of the survey. The key finding of significance to this study was that 60-70 percent had a gap of non-employment before returning to work. This was commonly represented by several

work transitions. The overall finding was that people in New Zealand choose to make a gradual transition to retirement rather than an abrupt one. (p.21)

The key findings of Gene Cohen's (2005) research on retirement in the United States found that more than half of his study of 100 adults (aged 60 – 90) wanted to work up to the age of 75. When eligible for the New Zealand pension, older workers' financial status varies considerably and those who have suffered financial misfortune do not have the luxury of time in the future or career opportunities available to them to catch up again. Being able to continue to work beyond 65 is significantly important for most people, whether they need to, or wish to as a lifestyle choice.

Sharon Buckland's *New Zealand Boomer Dreams Study* (2009) surveyed 1,162 New Zealanders to compare intentions for retirement with an American attitudinal study. Neither populations express any intention of retiring; *both are gearing up to reinvent their lives and the concept of work (of which "job" is just a part), to their greater satisfaction.* (p.74)

In New Zealand, as in many parts of the world, there is no longer an obligation for people to retire when they reach the age of being eligible to receive a pension at 65. (It is speculated that the eligibility age will increase to 67 within the next few years). The pension value however, has not kept up with inflation, and is considered barely enough to fund the basic necessities of living. It is also no longer mean's tested, which enables people to supplement their pension with some income.

Due to the new *work contract* (Hall, 1995) and current economic and social conditions, retirement is fast becoming outdated concept and as yet, has not been replaced by another term that better describes this significant later change of work and life focus. Denton and Spencer's(2009) review of retirement in Canada found that there is no one measure of what constitutes retirement. From a policy perspective they question the appropriateness of retirement being measured by having a pension. Rather they propose that retirement is a unique concept which is predominantly subjective, and that it currently indicates a negative concept focusing on what one is *not* doing, as opposed to the more positive, that of what one *is* doing.

Joel Savishinsky says in his work, *Creating the Rite of Passage for Retirement*, (2003) that "*The lack of attention to appropriate retirement rituals in American society reflects our culture's lack of clarity about what this stage of life is about.*" He further states, *we are more certain of what people are leaving than of what they are going to.* (p.82) Not only does his paper reflect the idea that

retirement is an event, it also suggests that by not having retirement as an event we may be missing out on a meaningful rite of passage. This could explain the collective ambivalence and uncertainty around how to manage the later work transitions. This lack of clarity is possibly stimulated by the *new work contract* which gives much more flexibility and independence to individuals, relying on their subjective workings out to find their own way towards concluding their working lives.

Engaging a *Life Course* perspective, Mutchler, Burr, Pienta and Massagli (1997) suggest that to understand later transitions we need to view change and labour force exit as a process rather than a single event. They use the term *work trajectories*, or pathways which consist of a series of transitions and events that are interdependent within and across the *trajectories* of those around them. (p.54)

*Life Course* perspectives are useful for understanding individual considerations in later career transitions. In his *Gendered Life course and Structural Effects on Rates of Post-retirement Employment*, study, Robin Pleau (2008) explored post-retirement employment from a sociological lens to understand gender differences. The study found that gender featured significantly. In particular, single women were more likely to continue their employment longer probably due to economic need. Other findings were that men were less likely to work post retirement if they had continuous employment prior to retiring, and that married women were less likely to return to work whose mean years of employment were much less than men's.

Research tells us (Calvo, 2009; Chan, 2001; Davey, 2006; Dixon, 2008; Hall, 1995) that taking control of later decisions has proven to be an important factor in the creation of successful transitions and healthy post retirement engagement. Phyllis Moen (1996) stated in her research that retirement can be either beneficial or detrimental to health and well-being, and that the circumstances surrounding the transition, whether it is voluntary or not and how it is perceived, become consequential.

Kim and Moen (2002) identified the factors that impact on older transitions are economic security, emotionality security (evidence of partner or close relationships), health, transition skills and current work environment support structures and culture. They used a *Life-Course, Ecological* model through which they propose that later transitions focus on process, context and the interdependency of linked-lives. They described the transition to retirement phase as a subjective developmental and social-psychological transformation linking retirement status with psychological well-being. They cite Hertzog, House and Morgan's (1991) study of 50 – 70 year olds, which compared states of wellbeing, finding that those who had higher levels of well being had some control over their retirement decisions and process. (p.213)

Exploring the state of well-being in later working lives further, Michelle Silver's (2008) research supported her hypothesis that the type of work people did impacted on well-being later in life and in retirement. She found that people in roles which had greater autonomy and creative challenge were more likely to experience higher states of well-being than those whose roles were more labour orientated. (p.15) Robin Pleau's work (2008), suggests there is a positive correlation between higher levels of education and post retirement employment. This feeds into the general understanding that the knowledge economy now offers more opportunity to work longer when one's employment value (or currency) is knowledge, rather than service or brawn.

Ulrich and Brott's (2005) research found that rather than cope by developing new strategies with the changes and challenges of work situations, generational differences and unmet career expectations, people retired. This could indicate shifting values and priorities and overcoming disappointments. Most participants in their study however, credited bridging work as helping them feel better about themselves. (p.165)

Wang and Shultz (2010) suggest that bridge employment enables the continuation of other life patterns leading to more positive outcomes psychologically. (2010) Adjustments are made to fit with changing health and personal circumstances. They gave the example that by adjusting physical effort and activity may increase cognitive resources which were otherwise compromised in stressful jobs.

Implicit in transition phases are stages of endings (losses), neutral zones (in the unknown) and new beginnings. (Bridges, 2001) Endings are difficult and often reactionary, the consequence of which can impact on the time before renewal and a new beginning happens. The time in between is often the time when old habits, routines, relationships and roles are broken. The state of confusion that happens between an ending and a beginning are the very opportunities when the resolution of crucial issues is possible before a new identity is structured. Levinson and Erikson would describe this as identity confusion. Schlossberg, Waters and Goodman cite Bridges on page 150 of his 1988 work, *"Surviving Transition"*, summarising transitions as being *Endings and beginnings with emptiness and germination between*. (p. 40)

Choosing to end paid employment is a self-declared shift to alternative activities. A gradual and voluntary retirement is by all accounts, preferable. Esteban Calvo, Kelly Haverstick and Steven Sass for the Centre for Retirement Research at Boston College (2009) found that a gradual transition rather than a sudden one is more likely to enable people to shift their identities in a more deliberate

way. (p.130) Concluding that having a sense control in the way retirement happened made a significant impact on retiree's happiness.

The *Life Course* model emphasises the importance that time, context, process and meaning influence development. The theory is highly applicable to the experience and conditions of the 'Baby Boomer' cohort, enabling us to understand the developmental challenges by viewing them from the perspective of their *life course*. Having been born into post WW2 economies and the evolution of rapidly changing economic conditions, social paradigms and changing expectations and goal posts, people in their 60s have had to integrate much change.

Finally, from the models, theories and research discussed, phasing down from full time work enables the integration of developmental tasks and adjusting to new priorities. The career horizon for someone aged between 60 and 70 becomes very short indeed and so the pressures to find congruence at work within a defined set of parameters and conditions is challenging. At the same time, successful adaptation and the resulting personal development required to navigate this new work environment are significantly important for the future well-being of the mature worker.

### **Research Methodology**

The decision to undertake a qualitative approach to this research was made so that a wide range of themes could be explored without predicting or attempting to prove any particular theory or hypothesis except that the Hero becomes master of his or her own journey. By interviewing and recording individuals' stories the data collected was grounded in the reality of professional's lives enabling the sociological influences and development to be expressed and analysed.

Ten professionals of diverse backgrounds from within my extended network were selected from 22 who volunteered to be interviewed, all of whom were surveyed so as to select 10 with differing circumstances, in order to achieve a diversity of experience. The goal was to have people from different vocational backgrounds, employment status and personal circumstances. A telephone questionnaire established who should be interviewed from a set of criteria and interview appointments were set up. Most of these happened at the participant's home or place of work, and all interviews were recorded digitally. The interview process followed a set list of questions and the researcher took hand written notes. From the notes taken common themes were identified and recordings re-listened to capture relevant and poignant messages.

The interviews consisted of a broad, qualitative enquiry into personal and work experiences so that context was well integrated and considered as part of the research. Personal development was an intentional focus so that the enquiry could ascertain how participants were making sense of their experience and integrating changes. The interview itself was aimed at being a constructive process by including questions that deliberately explored stories of how participants transformed difficult times, situations or transitions so as to enhance their self awareness and maintain their confidence.

The selected group consisted of individuals who were able to self-reflect. This has made it easier to assess the competencies and maturation themes from successful individuals who, through their reflections and understanding, were able to provide indications of what helped them to master or transform their situations. The wisdom of the group studied was considerable as most hold senior level positions or are in business or practice utilising their extensive expertise. As in the formative studies of NLP and other therapeutic modalities, the study of well functioning human beings give us models for success.

**Participant profiles:-**

<b>Age &amp; gender</b>	<b>Employment status</b>	<b>Vocation</b>	<b>Marital status</b>	<b>Next 10 years?</b>	<b>Mortgage</b>	<b>Investments &amp;/or super</b>	<b>Kiwisaver</b>
Robyn, 62 F	F/T salary	HR Adviser	Married	No plans	Yes	No	Yes
Christine 60 F	F/T salary	Landscape architect	Single	F/T →4days	Yes	No	Yes
Paula 64 F	Self- employed	Trainer/ Bodywork	Married	4days	Yes	No	No
Donald 65 M	F/T salary	Academic Lecturer	Married	F/T Phasing down	Yes	Yes	
Carl 61 M	Self- employed	Investigator	Married	No plans	No	Yes/No	Yes
Carol 65 F	Self- employed	Psychotherapist	Single	No plans	No	Yes/No	Yes
Peter 63 M	Self- employed	Business owner	Married	Sell bus/Exit	Yes	No/Yes	Yes

				plan			
Nick 65 M	Part employed	Writer	Separated	No plan	No	No	Yes
Glenda 60 F	F/T salaried	H&S Manager	Married	No plans	Yes	Yes	Yes
Bob 65 M	Retired	Scientist	Married	Some plans	No	Yes	Yes

The strength of the study was that it was able to identify the developmental themes noting research that fits with the resulting data, enabling a fresh perspective on what happens in our current social and economic environment for people in their 60s. It suggests that the tasks involved with working longer are about letting go of aspirations, expectations and dreams unmet, and of finding the intrinsic benefits of being engaged, interested and learning; with renewed mission and focus. The analysis highlights the recurring themes from a positive, constructivist perspective so as to identify the essential tasks required of the older worker, who through overcoming challenges and accepting limitations, becomes the hero of their own journey.

The fact that the study group consisted of high functioning adults, who had an average or above average intelligence and financial status, and were predominantly of Pakeha / European origin, deems a limitation of the study. A larger study of a broader population with a more diverse range of personal, financial, ethnic origin and work status may have illuminated additional or different developmental tasks. One could presume however, that existing theoretical models have given us sufficient understanding to recognise that many of the themes identified are universal. Further research of a much larger cohort would be required to glean the developmental tasks of an average population.

### **Analysis of the Interviews with Participants and Findings**

A range of themes emerged from the study which showed that shifting priorities, and continued engagement and development were important to the participants. The study held a developmental focus by gaining evidence of internal and identity development through later life experiences. The themes correlated with much of the theory reviewed in the literature yet are presented in such a way that provides a psychosocial overview of what people experienced.

Ten themes were identified which are categorised into two key groupings; Tasks of transformation which are essentially *developmental*, and strategies for continued engagement and self care, which I see as gaining or creating attitudes that *support*. (Kegan, 1994)

**1) Five Tasks of transformation (*developmental*)**

**2) Five strategies for continued engagement and self care (*support*)**

**Five Tasks of Transformation**

1. Living with the consequences of the past: Letting go of unachieved goals and disappointments
2. Acceptance of self and context: Finding the silver linings
3. Making sense of aging and coming to terms with ones mortality
4. Finding what matters and creating a sense of purpose
5. Adjusting life roles: letting go of expectations that no longer serve

**Five Strategies for continued engagement and self care**

6. Embracing complexity: More open to difference
7. Valuing and developing knowledge: differentiated by expertise
8. Continuing engagement by proactively addressing changing values and priorities
9. Gathering inner resources: developing strategies for self care and maintaining well-being
10. Creating opportunities for development and creativity

Exploring the 10 Developmental themes further, I will give examples of participant's experiences, and although only one or two examples will be given, the themes were identified if more than half the study group had a similar experience or development.

**1) Tasks of Transformation**

Central to understanding the developmental tasks that people make in later careers is the task of sense-making and transforming transitions. Transformation could occur by stepping back and realising something that can then be integrated into an action. Robert Kegan (1982) describes this as being the movement from "subject" to "object", or becoming more objective and resolved about an experience that one had previously associated subjectively to and was unresolved about. In his book, *In Over Our Heads* (1994) he says transformative learning happens when someone changes,

*not just the way he behaves, not just the way he feels, but the way he knows—not just what he knows but the way he knows (p. 17).*

Everyone who participated in the study group went through a time of reflection and change often triggered by an injury, or illness, or a work related transition such as redundancy. These transitions took place in their late 50s early 60s and often took a number of years to resolve, impacting on their lives in a significant way. Almost all these experiences caused the protagonist to take stock (consciously or not) of their lives and this process was sometimes accompanied by depression and/or a deep questioning of what mattered, who they are, and how they were going to live their lives from then on. Lorene Ulrich and Pamela Brott (2005) identified the transformative tasks of later work transitions as; fulfilling a mission, becoming a change agent, seeking freedom in thought and action, playing out personal ideas, maintaining organisational ties, saving the family business, or building more savings. (p.166)

#### **1. Living with the consequences of the past: Letting go of unachieved goals and disappointments**

Living with the consequences of earlier difficult experiences and misfortunes was clearly a common theme. These experiences were career or business related and some were more personal, or health related. These jolts to consciousness were, for most participants, eventually integrated into a new *life structure* that enabled them to move on. They recognised that the very experiences they found so difficult offered learning they would not have otherwise gained.

Carl, ex Director of a company, described the experience of another shareholder not being willing to buy his shares at a time when he was suffering a depression and in therapy (as a result of traumatic experiences when serving in the in the police force), as *gut wrenching*. Reshaping his life took some years but he is satisfied with what he has developed, both as a professional and as a person.

Often times of transition involve multiple crises that took some time to recover from. Carol was made redundant and not long after that her mother died. Her mother's inheritance gave her an opportunity to retrain, however study was challenging and she felt alone and isolated. As a single woman, Carol struggled to overcome her disappointment of not having a close life partner and having to live out her life without a close companion. She has since however, developed meaningful relationships with other people, particularly other women who value her.

Peter, a senior corporate manager, was made redundant at 55 causing him to re-invent himself as a business owner. For a couple of years, when applying for senior roles he experienced ageism and was turned down even though he was shortlisted. It was a difficult time; however he eventually started a business venture from scratch and is discovering ways of moving beyond the importance of his work identity to broadening out his life through getting involved in a wider range of interests. His second wife supports this and he values how she has introduced him to things he would never have been involved in.

Bob (65) had planned to downsize his role as a scientist, however a buyout of the company he had worked 23 years altered his plans. They appeared to not recognise his institutional knowledge and reduced his responsibilities before he could negotiate his gradual retirement and this prompted a decision to leave. He is now quietly building a small client base that uses his expertise on regulatory matters.

The losses incurred in a business venture propelled Glenda to re-enter the corporate world in her late 50s, describing her current situation as being in *catch up mode*. Being diagnosed with a terminal illness, in the late 50s, Nick had continued his writing work with renewed understanding.

## **2. Acceptance of self and context: Finding silver linings**

Most participants had times of self-doubt during major transitions. They gained confidence again after they became resolved and committed to an adjusted way of being, finding strength in a renewed purpose regardless of social perception and contextual issues. Several participants described that they lived with a minor level of anxiety; however by being more secure in themselves they were more able to integrate and accept any perceived limitation. The very task of self-acceptance seems to have lifted them to a higher level of competence. Carl said that he liked himself more now since doing some NLP training. He realised that that he had a habit of criticising others as a way of avoiding dealing with his own insecurities.

Nick is accepting the limitations his illness brings, however he is using his time to be with his son more fully. Although his income is diminished he continues to work when work comes to him. He has built a rich network of friends and is engaged in choir activities that uplifts his spirit.

Those participants with partners discussed how they have accepted their interlinked lives and how the impact of individual circumstances, such as health and business or work issues are shared. Both

Robyn's and Paula's husbands have potential health or employment issues that have an impact on their sense of security. Accepting and valuing their commitment to the partnership finds its own silver linings.

Working in a busy division of local government, Christine had struggled with the *do it now and good enough* mentality, yet she has accepted her own different approach and learned ways to stand her ground by being *gracious and professional* and using her experience to mentor and coach younger colleagues. Having had therapy for some time to overcome mental illness Carl is more accepting of himself and has developed a more assertive, confident and detached approach to his business and this is bringing him renewed business confidence.

### **3. Making sense of aging and coming to terms with ones mortality**

All participants expressed a degree of discomfort about aging, and one or two admitted to being frightened about getting older. A number had experienced recent deaths of their parents or had major illnesses or injuries that 'woke them up' to the realities of the aging process. Robyn described it as being *not too comfortable about the future* and Carol discussed being frightened of being on her own as she aged; she is currently in the process of coming to terms with that.

Don had been a keen runner which had been a very satisfying aspect of his life, however breaking his Achilles tendon at 64 was a major blow. The experience reinforced what would happen if he became physically limited. Just before this happened his partner of many years had breast cancer surgery. Both events caused him to realise the *fragility of life*.

Having had a mental illness through trauma, Carl felt he had to face his *morbid sense of life*. Also being a supplier to professional services clients, whose employees are young, he was concerned about their perception of his competence as he gets older. He is confident about what he offers, however, relying on his vast experience to compensate for this. Paula had a breast removed as a result of a malignant cancer just before she turned 60. She described the experience of this as *stripped away a lot of ego* and yet she said it, *woke me up to what was important*.

Having terminal cancer, Nick described the experience as being on *death row*, but that he doesn't have to be preoccupied with it all the time. Making arrangements for his son has been an important priority. When asked *how do you come to grips with dying*, he believed that one never does, but that by acting on any triggers that might worry him he takes some control. He said he confronts death all

the time but has had to be practical about it. Since his 40s Nick has had an awareness of mortality and this understanding has been a central competency in recording people's stories.

Fears of being marginalised were common, however almost all participants found meaning in their aging, appreciating the maturation process and the experience they have accumulated and can share. Christine, who reinvented herself into a new career at 50, has had direct experience with ageism and struggled with others' perceptions in the workplace until she came to terms with herself as an aging professional, recognising the particular strengths that her experience brings. She is committed to remaining *generous and gracious* when others have expectations around speed of delivery and are willing to compromise on quality.

#### 4. Finding what matters and creating a sense of purpose

Almost all participants discussed shifting priorities. Major health crises have been pivotal in reassessing lives and exploring what really matters. When Don tore his Achilles tendon, he recalled it causing him to evaluate how he *stood in the world*, realising that he wasn't standing up for what mattered. Caring about the planet, ethics and appreciating people are now more important than ever before. He is now committed to the *rightness of things*; his students learning and making sure that they are well served by his successor. Nick, with a terminal illness *would give up now* if he didn't have a young son. He said he *loves to be part of his life*. *The buzz in life is to make one's self useful; to comfort a child*. And having been very career focused Chris believes that fitness, health and family are now more important to him, and Christine wants to contribute by being part of something bigger than herself.

Integrating all aspects of life and work become important as values shift towards the whole rather than the self. Paula said she is committed to continue doing meaningful work *until death*. The simpler things in life such as nature, being committed to a healthy planet and raising people's awareness about that is more important to her now. Paula's criteria for living are *is it easy and is it fun?* Seeing her children live happy lives and the development of humility is a key motivation in Glenda's activities.

Continuing to work in a way that is sustainable corresponds to working in alignment with values. Older workers shift their priorities and manage the process of phasing down or phasing out to more satisfying work giving them a greater sense of purpose and meaning. Robyn believes that honesty,

courage, integrity and using wisdom are more important to her now. Christine is clear that she has become *unyielding to compromise her integrity* at work.

Finding out what matters inevitably causes people to address their need for money. Having to take personal responsibility for one's own financial security now is a key concern, especially as we are living longer and the pension at 65 provides only for the bare necessities. The focus here is not so much on the need for financial security, but on how it matters and where it is in terms of being a priority. Peter felt that he was *still concerned about financial security*, however he was noticing that meaningful business ethics and practice and close relationships and friendships were becoming more important. Glenda admitted to liking *nice things* but that they are not critical. On the pragmatic end, Paula felt that although there were more things that were important to her now, continuing to earn was important as it gave her more choices in life.

#### **5. Adjusting life roles: letting go of expectations that no longer serve and creating networks**

It stands to reason that as our families grow up and our parents get old we adjust our relationships to them and the expectations that come with that. The older working generation has often been described as the 'Sandwiched Generation' whereby they play an important role in caring for aging parents and supporting adult children who have career and family challenges. As aged parents die the intensity of the involvement shifts, and with it comes more flexibility to find or deepen other interests.

Work roles change as effort is measured against values and needs. Often using their vast experience in mentoring, coaching and advising, people can shift expectations from a productivity focus to being valued for institutional knowledge or expertise. Robyn described how her growing role as an elder at work made her feel valued. Paula is developing her supervision profile as that enables her to share her experience and grow other practitioners in a meaningful way. She believes that by reducing her training work she could do more supervision work, enabling her to work into her 70s.

Letting go of parenting responsibilities and expectations has been a very big focus for most participants. Balancing the responsibility of parenting with *letting them get on with it* - adult children find their independence and own lives, the role shifts from parent to supporter. Peter and his second wife have blended families which requires some mediating and nurturing of relationships, however they have found that their holiday home has become a valuable and enjoyable gathering place.

Enjoying the grandparent role is a common theme and meaningful engagement with family is valued by participants.

Nick, on the other hand, fathered a son - and only child at 60. Coming to terms with being a parent for the first time has been challenging, and also deeply rewarding. *Life stage, life age* proponents would tell us that being out of sync with social norms presents its own challenges. For Nick, his son is a gift, providing him with a meaningful role at this particular stage in life.

Close relationships were important to all participants who described how these have changed as they have aged. Shared experiences were important, however partner roles shifted to being more equitable and companionable. A new level of acceptance and making the most of close partner commitments appears to happen. In her role in the broader family Robyn was once considered *the brick*, however she has let go of that expectation through recognising that it no longer served her nor her family who needed to take more responsibility for the consequences of their activities. She also described her spousal relationship as *living parallel lives* and with different interests, but that they each respected and accepted that. Peter valued how his second wife, whom he married later in life, has broadened his interests and exposed him to new ways of being.

Outside of the close relationships, developing external social roles was important to participants. Women participants, especially, felt the development of important relationships mattered. This role appears to take the place of other roles that diminish later in life such as being the parent or adult child. The men on the other hand, did not place a similar level of importance on having male friends. Donald, on the other hand, valued his men's group which *draws him out* and provides the opportunity to gain a different perspective.

### **Five Strategies for continued engagement and self care**

Moving into the later stages of one's life presents issues of balancing well-being with meaningful engagement. All participants described how they navigated this process through making choices when contextual situations changed. This self and context monitoring and gaining support seemed a very important competency for making the adjustments to fit with changing needs.

### **6. Embracing complexity: Being open to and accepting difference**

By the time people are in their 60s they have experienced a lot in life. Research tells us that through experience we embrace more and more content and that the brain utilises information more

effectively when it is well resourced. Building complexity and being able to deal with multiple demands and uncertainty are *Meta* competencies for maturing. (Cziksentmihalyi, 1990; Kegan, 1982; Rock, 2009)

Paula believes that she is now able to manage complexity and *contextualise* it in her work. She notes this as an expanded awareness that is more grounded and centred in experience. As a facilitator she can *hold difference* in a group far better than she ever did before - *I'm not afraid of anything*. In the past she admitted that she *would have gone into a sweat*, however she has developed this level of competency as a result of her illness that *stripped away a lot of ego* and put her in a *very accepting place* about life.

Being non-critical and without judgment was a quality that a number of participants said came with being mature, and a number said that things weren't black and white' any longer; that shades of grey were now very acceptable. Glenda is committed to not taking life too seriously and being open to difference. In the workplace she notices herself not being triggered by different opinions, and by remaining neutral she finds she has a greater sense of competence.

Nick knows the value now of not judging and that this is a very different attitude to how he was as a much younger man. Through the writing of people's lives he has been learning the importance of not criticising or condemning people for the way they do things. He is more accepting and able to look at what influences people's lives and uses this as a process to reflect on his own life which expands his understanding. Paula also acknowledged the learning she gained by working with a group of young people and how that expanded her thinking.

## **7. Valuing and developing knowledge: differentiated by expertise**

In the social and business economy of today knowledge has currency and this plays nicely into the hands of those who have developed expertise and experience. Being all professionals, this group was very clear that their experience and knowledge differentiated them. They recognised the value of continued development, yet in the gathering of that knowledge, the need for efficiency of effort is now more important. Lifelong learning and its value for maintaining mental agility is a recurring value to all the participants. New science is proving to us that the brain continues to develop as we age as long as we use it. Both personal and skills development is necessary for continued cognitive agility. (Kanfer, 2004)

Peter recognises the breadth of experience he now brings to his role as a business owner. He sees himself as a general practitioner who, when he is ready to sell his business, could contribute to other people's business success through consulting. Being an expert in Complimentary Medicines and recently semi-retired, Bob is now able to sit on regulatory boards and build his practice as his area of expertise is rare in New Zealand.

Participants are aware that their currency in the marketplace is knowledge and that being committed to its development is vital to the level of contribution they can make and the sustainability of their careers. Paula reads extensively and attends as many conferences and relevant seminars as she can to continue her own knowledge development. Taking on a research project is of interest to Paula yet she is aware of the pressure that might place on her. And Don felt that developing a research profile for himself would enable him to reduce his lecturing responsibilities and focus more on meaningful knowledge sharing and development.

Common with all participants was the need to *keep a finger on the pulse* of things. Nick recognises needs for knowledge development when his competency is challenged. He notices a feeling of ineptness which spurs his action to 'find out'. Glenda maintains her professional memberships and nursing registration so that she continues her involvement, keeps her choices open and engages in the development opportunities they provide. And Christine set up a special interest group in her area of Open Space Planning so that she can increase her knowledge through the shared experience and wisdom of others and at the same time, this activity grows her visibility.

#### **8. Continuing engagement by proactively addressing changing values and priorities**

Through times of challenge and transition people discovered changing priorities and at the same time, rather than withdraw or disengage, all felt the need to adjust how they engaged with their work and social contexts. Almost all participants were at an established stage in their working lives and had made choices that saw them enjoying what they do and wanting to continue that engagement. Phasing down, or shifting work arrangements were being considered as they neared their mid 60's, affirming adjusted values and priorities, however, for all but one participant, retirement was no longer an option. None of the cohort was considering disengagement, rather continuing to make a contribution through engagement in activities of interest is vitally important to them. Carl said that his father retired at 55 and believes that his life stopped then. Through watching this happen to his father he is deeply resolved and committed to continuing his own engagement and development for as long as he is able. Carol felt that *not working doesn't feel safe*.

Don (65) has reframed retirement. He described it as *re-tyre-ment* – *having a new set of tyres*, implying that activity continues with renewed priorities and focus. Peter (63) *lives* for the intellectual stimulation in his business interests however he would like to sell his business in 2 years time, at which time he proposes to *restructure* his life. Christine wishes to continue her work until 70 or beyond and will reduce her hours when she is ready. She feels more empowered now to make her own way and will reshape her work to fit her priorities when she feels ready to, however she admits to some insecurity because of the current local body organisational restructuring.

#### **9. Gathering inner resources: developing strategies for self care and maintaining well-being**

Taking control of later transitions and choices is deemed critical to well-being and aging. Health concerns and decreasing physical resilience causes people to develop more conscious ways to use their energy and gain support. Following on from surgery, Paula's parents died within a short time of each other, and soon after her husband had an accident while they were doing renovations on their home. This was a traumatic time for them both and it gave Paula the resolve to make sure she was better resourced internally.

Most women seek the support of other women to help them to be resourced and supported. Robyn said that she needs to be people who accept her as she is, such as her son and good friends. In his book, *Social Intelligence*, Daniel Goleman (2006) states; *The more close friends women have, the less likely they are to develop physical impairments as they age, and the more likely they are to lead a joyful life in their later years. The impact appears to be so strong that friendlessness has been found to be as detrimental to a woman's health as smoking or obesity.* (p. 245)

Renovating their home has been a meaningful exercise for Paula and her husband who have set themselves up in a lovely environment and in consideration of their future changing physical needs. Glenda loves work and has found practical ways to address her changing needs for space and flexibility.

Finding leisure activities that nourished and inspired them were acknowledged ways of feeling good about life. Robyn allows herself read a book for a *whole day* in the weekends, a luxury she has not had until now. She values taking time for herself and living with the notion that things are *good enough*; an attitude that enables her to accept herself and where she is at in life. Nick (65) can now enjoy the "Gold Card" which he makes the most of by traveling to see friends on Waiheke. He is now

less constrained by being on the pension and values the more freedom in work and leisure that gives him.

### **10. Creating opportunities for development and creativity**

Having more flexibility to be creative and innovative is recognised by theorists as being critically important for choice-making efficacy and having the ability for re-invention. As Carl Jung espoused, creativity becomes a priority in later life as people are drawn (almost compelled) to explore the unexpressed aspects of their lives. (Cervone, 2008) Contrary to the stereotypical older person, becoming open minded to new ways of doing things, new ideas and new perspectives on how one sees one's self and the world, enables greater flexibility to adjust to new areas for development. Personal development and creativity goes hand in hand as we seek to be open to ways of managing and preparing for, what appears on the horizon; another challenging prospect - the process of dying.

Regardless of whether or not people were still working, all participants recognised the opportunities they have gained for deeper development. Because Carol's (65) work as a practitioner has diminished recently due to changing government policy around suppliers to ACC, she expressed the feeling that her value has shifted and that she was no longer sure of what she offered because there is no demonstration of it being recognised and appreciated. Being a psychotherapist and also an artist, however, Carol is well resourced to use her painting as a therapeutic and developmental strategy to supplement her income.

The internal shifts that happen at this time seem to take people to an internal landscape which eventually no longer frightens them. Paula said that *getting older gives her the opportunity to be more contemplative and reflective* and that this may lead to writing or some other creative expression of her wisdom. Nick values the *intellectual freedom* he has to think for himself and Carol finds her writing group provides her with a very rich, safe and profound avenue for exploring the deeper aspects of herself.

### **Summary**

This is a time in history of unprecedented change resulting in labour market conditions that are difficult to navigate, and yet never before has it been so evolutionary and freeing for older workers. To work longer than they once expected to, people in their 60s and 70s need to be more adaptable and efficacious. Resolving past identity issues and self-limiting perceptions appear essential before moving into the later stages of one's career more successfully. Taking control within the context of

one's environment and a greater level of personal responsibility for the way later transitions happen is proven to increase well-being. To transform transitions, reflecting on one's changing priorities and values integrates and harmonises personal goals within a life context.

*Identity growth* involving the development of increasing complexity through self-reflection and self-learning, and developing *adaptability* (Hall, 1995) are indeed critical in this time of *subjective developmental and social-psychological transformation*. (Moen, 1996) The most stunning finding in this study is that the working environment has changed dramatically within the lifetime of the participants, forging opportunities for transformation and development for older workers. Old paradigms have shifted with a new world order altering the way we see aging. *Ultimately an older society has to be more efficient because there won't be the resources to fix problems. Aging is an opportunity to build a better society, not an uncaring one.* (Freedman, 2008)

One participant in the research offered the statement which reflects my own reason for doing this research paper; *Society needs to be educated... there are some huge personal development challenges being the front end of the baby boomer cohort...that whole educative role....society needs to make a huge shift. Whenever I hear about the burden we are going to be..... You could turn that around to see it as a huge resource – something we could have real joy and delight about! There are some real leadership challenges here.*

And another salient quote; *In the past few years, I have made a thrilling discovery...that until one is over sixty, one can never really learn the secret of living. One can then begin to live, not simply with the intense part of oneself, but with one's entire being.* Ellen Glasgow, Pulitzer Prize winner

Finally, having faced aspects of him or herself that were limiting and encountering challenges in the world he never expected he would have to face, the Hero returns renewed, offering greater wisdom to the world.

**Kaye Avery**

**2010**

## Bibliography and References

- Bridges, W. (2001). *The Way of Transition: Embracing Life's most Difficult Moments*. New York, NY: Perseus Publishing.
- Buckland, S. (2009). *The New Zealand Boomer Dreams Study* Auckland: Massey University
- Calvo, E., Haverstick, K., & Sass, S. A. (2009). *Gradual Retirement, Sense of Control, and Retirees' Happiness*. *Research on Aging*, 31:112. doi:10.1177/0164027508324704
- Campbell, J. (1949). *The Hero with a Thousand Faces* (Third ed.). Canada: Pantheon Books.
- Cervone, D., & Pervin, L.A. (2008). *Personality; Theory and Research* (Tenth ed.). New York, NY: John Wiley & Sons, Inc.
- Chan, S., & Stevens, A. H. (2001). Job Loss and Employment Patterns of Older Workers. *Journal of Labor Economics*, 19(2), 484-521. doi:10.1086/319568
- Cohen, G. D. (2005). *The Mature Mind : The Positive Power of the Aging Brain* New York, NY
- Cziksentmihalyi, M. (1990). *Flow: The Psychology of optimal experience*. New York, NY: Harper & Row Publishers, Inc.
- Davey, J., & Davies, M. (2006). Work in Later Life - Opportunity or Threat? . *Social Policy Journal Of New Zealand Te Puna Whakaaro*(27).
- Denton, F. T., & Spencer, B.G. (2009). What Is Retirement? A Review and Assessment of Alternative Concepts and Measures. *Canadian Journal on Aging / La Revue canadienne du vieillissement*
- 28 63-76. doi:10.1017/S0714980809090047
- Dixon, S. (2008). *Transitions from Work to Retirement: Statistics New Zealand and The Department of Labour*. Retrieved 12/05/10 from <http://www.stats.govt.nz>
- EarthTrends. (2010, 14/5/10). *Global Demographic Trends*. Retrieved 14/5/10, from <http://earthtrends.wri.org>
- Elder, G. H. (1999, 10th August). *The Life Course and Aging: Some Reflections*. Paper presented at the meeting of the Distinguished Scholar Lecture, University of Carolina at Chapel Hill.
- Frankl, V. (1985). *Man's Search For Meaning*. Boston, MA: Pocket Books.
- Freedman, M. (2008). No Country like Old People? Its a Tough time for Seniors these days. *The Washington Post*.

- Glass, P. (2010, 15/5/2010). Compulsory Super Could Transform NZ. *The New Zealand Herald*. Retrieved from [http://www.nzherald.co.nz/business/news/article.cfm?c\\_id=3&objectid=10645019](http://www.nzherald.co.nz/business/news/article.cfm?c_id=3&objectid=10645019)
- Goleman, D. (2006). *Social Intelligence: The New Science of Relationships*. New York, NY: Random House Inc.
- Greller, M., & Stroh, L. (2004). Making the Most of “Late-Career” for Employers and Workers Themselves: Becoming Elders not Relics. *Organizational Dynamics*, 33(2), 202–214.
- Hall, D. T., & Mirvis P.H. . (1995). The New Career Contract: Developing the Whole Person at Midlife and Beyond  
*Journal of Vocational Behavior*, 47 (3), 269-289
- Hilkin, M. (2010). *The Hero's Journey: A Metaphor for Psychotherapy*. Retrieved May 24th 2010, from <http://www.herosjourney.com/Pages/herosjourney.htm>
- Howse, K. (2009). Age and Aging: Developing Theories and Making Policies. *Sage Publications*, 43(2), 388-393. doi:10.1177/0038038508101172
- Hurnard, R. (2005). The Effect of New Zealand Superannuation Policy on the Labourforce Participation of Older People.
- Kanfer, R., & Ackerman, P. (2004). Aging, Adult Development, and Work Motivation. *Academy of Management* 29(3), 440-450.
- Kegan, R. (1982). *The Evolving Self*. Cambridge, Massachusetts and London: Harvard University Press.
- Kegan, R. (1994). *In Over Our Heads: The Mental Demands of Modern Life*. Cambridge, Massachusetts, London, England: Harvard University Press.
- Kim, J. E., & Moen, P. (2002). Retirement Transitions, Gender, and Psychological Well-Being: A Life-Course, Ecological Model. *Journal of Gerontology*, 57B(3), 212-222.
- Kossek, E. E., & Lambert, S. J. (2005). *Work and Life Integration; Organisational, Cultural, and Individual Perspectives*. Mahwah, New Jersey: Lawrence Erlbaum Associates.
- Kroger, J. (2007). *Identity Development: Adolescence through to Adulthood*. Seven Oaks, CA: Sage Publications.
- Levinson, D., J. (1978). *Season's of a Man's Life* (Second ed.). New York, NY: Randon House Publishing Group.
- Lips-Wiersma, M. (2002). The Influence of Spiritual "Meaning-Making" on Career Behaviour. *Journal of Management Development*, 21(7), 497-520. doi:10.1108/02621710210434638

- McNickle, E. (1997). A Grounded Theory Study of Intrinsic Work Motivation Factors Influencing Public Utility Employees Aged 55 and Older as Related to Retirement Decisions *The Journals of Gerontology: Psychological Sciences and Social Sciences* 52B(1), . doi:10.1093
- McPherson, M. (2008). *Older Workers: Employers Speak Out*. Wellington, NZ: The EEO Trust.
- McPherson, M. (2009). *Occupational age and gender: Trends and Implications*. Paper presented at the meeting of the AUT, Age and Gender Symposium, Auckland.
- Moen, P. (1996). A Life Course Perspective on Retirement, Gender, and Well-Being. *Journal of Occupational Health and Psychology*, 1(2), 131-144.
- Mutchler, J. E., Burr, J.A., Pienta, A.M., & Massagle, M.P. (1997). Pathways to Labourforce Exit: Work Transitions and Work Instability. *Journal of Gerontology*, 52B(1), 54-512.
- NZPA. (14/5/10). Baby boomers facing hard times as they age: research. *The New Zealand Herald*. Retrieved from [http://www.nzherald.co.nz/nz/news/article.cfm?c\\_id=1&objectid=10644721](http://www.nzherald.co.nz/nz/news/article.cfm?c_id=1&objectid=10644721)
- Robson, S. M. (2000). *Successful Aging in the Workplace: Maintenance vs Development in Older Workers*. University of Tulsa, Tulsa, OK.
- Rock, D., & Tang, Y. (2009). The Neuroscience of Engagement. *Neuroleadership Journal*(2).
- Savickas, M. L., Nota, L., Rossier, J., Dauwalder, J.P., Duarte, M.E., Guichard, J., Soresi, S., Van Esbroeck, R., van Vianen, A.E.M. (2009). Life Designing: A Paradigm for Career Construction in the 21st Century. *Journal of Vocational Behaviour*, 75, 239-250. doi:10.1016/j.jvb.2009.04.004
- Schlossberg, N. K., Waters, E.B., & Goodman, J. (1995). *Counselling Adults in Transition, Linking Theory with Practice*. New York, NY: Springer Publishing Company.
- Sheehy, G. (1977). *Passages: Predictable Crises of Adult Life*. New York, NY: Bantam Books.
- Silver, M. (2008). *What You Did For a Living May Influence How You Feel in Retirement* Paper presented at the meeting of the American Sociological Association Annual Meeting, Hilton San Francisco, San Francisco, CA, Aug 07, 2009. Retrieved from [http://www.allacademic.com/meta/p306550\\_index.html](http://www.allacademic.com/meta/p306550_index.html)
- Smedley, K., & Whitten, H. . (2006). *Age Matters :Employing, Motivating and Managing Older Employees*. Aldershot, England Gower.
- Stephenson, J., & Scobie, G. (2002). *The Economics of Population Aging*. Wellington. Retrieved from <http://www.treasury.govt.nz/publications/research-policy/wp/2002/02-05/twp02-05.pdf>

Tocher, M., & Simon, A. (2006). *Brave Work: A Guide to the Hero's Journey at Work*: Michelle Tocher.

Ulrich, L. B., & Brott, P.E. (2005). Older Workers and Bridge Employment: Redefining Retirement. *Journal of Employment Counseling*, 42(4), 159.

Wang, M., & Shultz, K.S (2010). Employee Retirement: A Review and Recommendations for Future. *Journal of Management*, 36 (172). doi:10.1177/0149206309347957